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LEARN | How Taxes Impact Wealth

Over time, taxes can erode portfolio returns, diminish disposable income and impact wealth longevity. Proactive, ongoing and year-round tax management can help your clients to compound and grow their wealth.

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Key Takeaway

You can help round out the information clients receive from their accountant and estate attorney by providing perspective on how taxes affect their portfolio.



Next Step

Consider which clients in your portfolio might be good candidates for further conversation about a tax-aware investment approach to help reduce the impact of taxes on their portfolios.

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4 Approaches to Help Reduce Taxes

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Disclosure



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