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# LEARN | How Taxes Impact Wealth

3 minutes

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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