



Navigating 2024: Politics, Policies and Portfolios

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Over the next year, election uncertainty will likely spur client concerns about volatility and possible tax legislation. As a leader in tax-managed investing, we can help you keep them well informed and positioned throughout the cycle and beyond.

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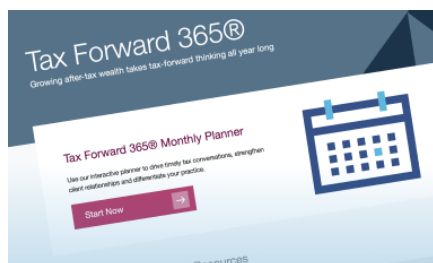
- December 12, 2023: Pre-Iowa Caucuses
- February 27, 2024: Pre-Super Tuesday
- May 21, 2024: Pre-Conventions
- September 10, 2024: Pre-Election
- November 19, 2024: Post-Election

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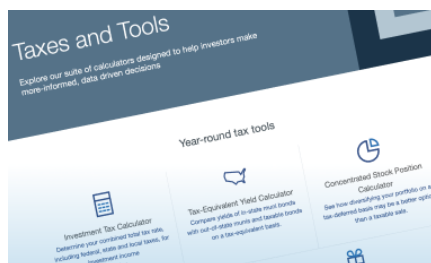
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May 6, 2024

"The finance ministers of Brazil and France have called for a tax on U.S. dollar billionaires of at least 2% of their wealth each year, hoping to shore up \$250 billion to combat poverty, hunger and climate change."

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[Uncle Sam Can Provide Certainty in Uncertain Times](#)

April 17, 2024

"After-tax advisors can help clients navigate the uncertainty and provide clarity with a tax tenet: Uncle Sam can be a coach, not simply a referee."

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*Institutional Investor, 2022

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