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LEARN | Tax Planning for Life Events

3 minutes

Major life events often come with tax challenges and investment decisions. Know the impact taxes have by creating a personalized plan for your clients that grows with them as their lives evolve.

Prefer to save for later?

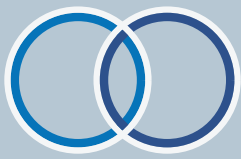
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Key Takeaway

April 15th is not the only important tax event of the year. Help your clients understand the tax challenges that can accompany events that they wouldn't necessarily think of as tax events.

Major Life Events to Discuss

Select an area to learn more about the tax benefits and challenges of each major life event.



1

Q [Marriage or Divorce](#)



2

Q [A New Baby](#)



3

Q [Buying a House](#)



4

Q [Selling a Business](#)



5

Q [Retirement](#)



Next Step

Review key tax dates, deadlines, and potential deductions for the year with your client.

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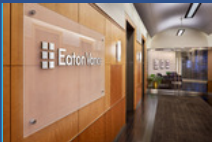
4 Approaches to Help Reduce Taxes

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Disclosure

Tax-loss harvest transactions aren't beneficial in a retirement account because the losses generated in a tax-deferred account cannot be deducted.

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