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Eaton Vance Tax Education Center

WATCH | Novel Ways to Talk About Taxes

2 minutes

Helping clients and prospects with tax-aware investment guidance doesn't have to start with a list of questions about taxes. Consider talking about one of the following topics as part of your regular discovery process with your client during the year, or while developing a comprehensive wealth management plan.

Topic 1: Incentive Compensation

Incentive compensation can trigger significant tax consequences. Ask to see your client's incentive compensation statements to find out if their plans are taking taxes into account. This, in turn, may lead to a bigger tax management conversation.

Topic 2: Concentrated Stock

Many business owners, corporate executives and other investors have accumulated significant wealth by owning large concentrations of a single stock, wealth that may need strategic diversification. When you ask them whether they have a large holding of company stock, it opens the door to discussing how tax-efficient diversification may be a better option than holding onto the stock.

Topic 3: Charitable Giving

Charitable giving is a well-known way for people to support the organizations they care about and receive a tax benefit. Consider introducing them to more advanced tax strategies designed specifically for sophisticated investors.

Topic 4: Estate Planning

Ask your client if their estate plan has been updated to account for recent tax changes, or changes to their family situation. This is also an opportunity to determine if the plan still aligns with their goals.

By asking your clients and prospects about these topics periodically throughout the year, you'll help educate them about the impact of taxes and demonstrate that you make tax planning a priority.

Take a few minutes to explore the Eaton Vance Tax Education Center at [EatonVance.com/TaxEdCenter](https://www.eatonvance.com/TaxEdCenter) for more useful resources to help you meet a variety of tax-forward investing needs.

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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