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Eaton Vance Tax Education Center

WATCH | Year-Round Tax Planning, Simplified

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Year-Round Tax Planning, Simplified

Left unchecked, taxes can erode portfolio returns, diminish disposable income, and impact wealth longevity. That's why it's important to think ahead when it comes to tax planning well beyond Q4 and tax day. Being tax forward year-round allows you to help your clients minimize their tax exposures, keep their wealth plans on track and proactively generate more value.

A comprehensive investment plan can help improve after-tax outcomes by coordinating asset allocation with asset location. For example, early in the year is an optimal time to discuss the types of equity awards clients have so you can build and execute a tax-efficient strategy for these assets. Mid-year, be the catalyst for planning conversations to evaluate this year's tax reality and identify adjustments to help improve next year's tax outcome, including the potential impact of tax law changes. In late summer, review your clients' expected charitable donations to give you time to implement tax-smart strategies for their gifts, and don't forget the importance of year-round tax loss harvesting to help clients offset gains with losses.

Consider mapping out an action plan to start these key conversations with your clients and prospects. Here's a preview of monthly themes you can focus on.

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

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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