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Tax planning – and solid long-term and short-term strategies – can help to meet financial goals and minimize the tax bill. Pairing sound advice with a solid plan can not only help to avoid damaging tax and estate planning errors, but map out measures for meeting business and retirement goals and get to the destination of financial freedom.



GOING LIVE IN PRINT AND ONLINE:
DECEMBER 6, 2018

GET INVOLVED BY:
OCTOBER 25, 2018

MATERIALS DUE:
NOVEMBER 22, 2018

Proposed topic highlights:

ADVICE. We explore the value of advice – and enlisting the help of professionals – for navigating the tax system.

FINANCIAL PLANNING. We highlight the intersections between tax planning services and financial advice with a strong focus on investment portfolios and products.

DIGITAL TOOLS. We look at apps and software that help with managing finances and tax preparation.

ASSET MANAGEMENT. What are some of the asset management strategies that ensure long-term success?

ESTATE PLANNING. With numerous factors affecting the taxation of an estate, what are the experts' recommendations for will planning, gifts and trusts?

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TAX PLANNING & STRATEGY



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