

2023 NATIONAL SPONSOR CONTENT FEATURE

NEWSPAPER AND DIGITAL

Tax Planning & Strategies



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Tax planning – and solid long-term and short-term strategies – can help to meet financial goals and optimize the tax bill. This special feature highlights how pairing sound advice with a solid plan can not only help to avoid damaging tax and estate planning errors, but map out measures for advancing business, family and retirement goals and financial security.

Proposed topic highlights:
EXPERT ADVICE – The value of expert advice for navigating the tax system.
FINANCIAL STRATEGY – Integrating tax planning into a sound long-term strategy.
TECHNOLOGY – Digital tools for managing finances and tax preparation.
ASSET MANAGEMENT – Leveraging asset management strategies for achieving financial goals.
ESTATE PLANNING – Top recommendations and advice for will planning, gifts and trusts.

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