Title: Drive Meaningful Advanced Planning Conversations

How can your practice stand out? Drive meaningful advanced planning conversations with existing and prospective clients. Here's where to start.

Do your clients know the power of tax deferral? Help clients keep more after-tax wealth over time through compounding returns on deferred taxes.

Do your clients have concentrations that pose a significant risk to their financial wellbeing? Use tools designed to help diversify portfolios and minimize income tax bills.

Have you discussed the tax benefits of charitable giving with your clients? Review strategies to help them improve legacy outcomes, unlock itemized deductions, avoid capital gains on highly appreciated assets and much more.

Do your clients anticipate a business sale, an inheritance, large asset transfer, or other major wealth event? Show your value as part of your client's broader tax team by helping them prepare.

To learn more about conversation topics that can help you build your practice, visit eatonvance.com/AdvisorInstitute.

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