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Tax Diversification - How Investors Can Reduce Taxes
Investing is simple, but taxes aren't. As a CPA, I

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make portfolios as tax-efficient as possible. I advise clients that the goal isn't to pay the least amount of taxes, but to make the most money after taxes. With fee compression eroding advisor profitability, this is one key area you can differentiate your practice and add value for your clients.

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...

Tax diversification is similar to asset location (not to be confused with asset allocation), which refers to spreading investment dollars among

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various account types (the location of the investment assets) and choosing the best investment types that work best in those accounts.

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5 Tax-Efficient Investing Strategies Worth Considering

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CROSSROADS, Practical Tax
Strategies, Jun 2012 ...

Investment tax credits and
the Section 1603 grant
program:

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The Tax Court found in
Phelan, T.C. Memo. 2004-206,
and Pool, T.C. Memo. 2014-3,
that protecting the
investment company's assets
from liabilities and risks
related to developing
property for sale to

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customers is a legitimate
business purpose.

6 Smart, Tax-Efficient
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