



1

TIP

Maximize your retirement account contributions

CONSIDER:

Retirement accounts have tax advantages, which—depending on the account type—may include tax deductibility, tax deferment, or the potential for tax-free income.

3

TIP

Consider tax-loss harvesting.

CONSIDER:

Tax-loss harvesting can help minimize your tax liability. Ask your advisor if this strategy may work for you.

FOUR TIPS FOR SAVVY YEAR-END TAX PLANNING

2

TIP

Spend any leftover funds in your FSA

CONSIDER:

Your account may vary, but most funds do not rollover into the next year

The time to implement tax-advantaged strategies for the coming year is now. Here are four practical tips you should consider implementing.

4

TIP

Think ahead to large expenditures that you may have.

CONSIDER:

With potential tax changes coming, it is important to think about how you will fund upcoming expenses—especially if you plan on selling investments.





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