



Tax Efficient Investing

Reto Gallati

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Tax Efficient Investing offers a comprehensive road map for investors to create a tax-advantaged investment strategy by following simple steps to become a more tax-efficient investor. Most individual investors tend to make investment decisions purely based on future expected returns and consider the tax-consequences only after the fact. Is it possible to keep more of what you earn on your investments? In the end, what matters is how much you keep, not how much you earn. Tax law changes you need to know about for 2013! As 2013 rang in, so did a significant number of changes to the tax laws. All important changes for tax year 2013 (referring to investment related topics) are included in this book. That includes e.g. the additional Medicare tax, new (and higher) income tax brackets, the Net Investment Income Tax of 3.8%, updated details about capital gain tax rates, exemptions, deductions etc. You will learn how to:

- Allocate assets among investments that have different tax-treatments;
- Utilize tax structures provided by the tax code (e.g. 401(k), Roth IRA, 529 colleague savings, etc.) to maximize your long-term investment returns;
- Intentionally realize gains and losses.

We should think about taxes throughout the year as part of the investment process, not just in the days and weeks before we file the tax return. In Tax Efficient Investing we examine the basic framework of individual taxation in the United States as it relates to investing. Unlike death, taxation can at least be minimized. Tax Efficient Investing explores tax-efficient investing-strategies designed specifically to minimize the negative impact taxes can have, particularly on long-term savings and investment returns. Many investors employ tax-advantaged strategies, but these are not the same as building a tax-efficient portfolio. In a tax-efficient portfolio, assets are diversified among taxable, tax-deferred, and tax-free accounts to reduce tax exposure. The tax-efficient investor takes intentional steps when realizing gains and losses, and allocates assets among investments that have differing tax treatments. Tax efficiency is especially crucial in a retirement savings portfolio where you may gain a material advantage by strategically drawing down certain assets before others. Although this publication is not a comprehensive guide to the U.S. tax code, it does offer a number of strategies and specific investment ideas that may help you enhance your long-term investment returns by carefully managing your tax liability. Every investment decision has a tax consequence. This book is not about how to cheat – we are not giving you any advice in that direction. We believe it's important for you to take a holistic view of your investment choices. We include taxes as given, not as an evil factor. By embracing taxes as part of our investment environment, we tend to make better choices than trying to avoid or ignore them. The taxes we pay on investment earnings can meaningfully affect long-term returns. A tax-efficient portfolio includes investments and account types with differing tax treatments. It includes, as well, strategies supported in the tax code such as loss recognition to offset another return or income. The strategic choice of asset allocation and securities, such as municipal bonds in a brokerage account vs. a Roth IRA, can systematically increase your return. The benefits from using these tax structures provided by the tax code (e.g. 401(k), Roth IRA, 529 colleague savings, etc.) can lead to substantial savings overtime. Tax Efficient Investing is not meant to be a comprehensive guide to the complex U.S. tax code. Rather, this book may help you make better and informed tax-related decisions when it comes to investing. It allows you to plan ahead and include taxes as a factor to generate sustainable returns. Many additional unique situations and circumstances may apply to you as a reader, which is why it is important to work with a tax advisor.

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Maria Hernandez:

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Christopher Hannah:

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