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Tips For Investing
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Impact on Investment
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Management The
Doug Roger's book,
Tax-Aware
Investment
Management - The
Essential Guide,
should be the
instruction manual of
choice for those
interested in
minimizing tax drag

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for themselves or their clients. As an investment advisor / planner, one focused upon tax-aware best practices, I support Doug's work and have designed elements of it into my philosophy as well.

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MANAGEMENT ...

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2850, Houston, TX
77019 | ...

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~~www.taxaware.com~~

Tax-aware investment management, also known as active tax

management, is the practice of

considering your

client ' s tax liabilities

throughout the

portfolio construction

process to proactively

maximize their after-

tax returns.

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~~A quick guide to tax-
aware investment
management~~

Investment returns are uncertain, especially in today ' s economic environment. But taxes are a sure thing. That's one reason why tax-aware investment management is

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essential for building
and maintaining
wealth. In this
comprehensive,
groundbreaking book,
Douglas S. Rogers,
CFA, explains why
many accepted
investment strategies
and techniques
developed for tax-
exempt institutional
investors don ...

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Management: The
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Underperformance of pretax returns: tax-aware strategies are investment strategies with the associated risk of pretax returns meaningfully underperforming expectations. Adverse variation in tax

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benefits: deductible losses and expenses allocated by the strategy may be less than expected.

~~Tax-Aware Investing~~
~~AQR Capital~~
~~Management~~

Tax-aware investment management is defined as actively maximizing the after-tax return an investor

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receives. The goal of investment management for high-net-worth clients should always be to actively postpone the realization of taxable gains, especially short-term gains, while maximizing realized losses.

~~Are Your Clients
Benefiting From Tax~~

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~~Aware Investment~~...

The fact is that tax-aware investing can add up to one full percent to returns per year on an after-tax basis 1 When compounded over time, this can make a meaningful difference in an investor ' s bottom-line results. With all the uncertainty

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associated with
investing, when there
are certain gains to
be had in returns, we
are firm believers in
working to capture
them.

~~Tax-Aware Investing—
Gerstein-Fisher~~

Tax-aware planning
and structuring Taxes
play a meaningful
role in the lives of

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nearly everyone, and when it comes to understanding them in the context of a sound financial plan, the right guidance can make a world of difference. ... N.A. or an affiliate, such as J.P. Morgan Investment Management Inc.; (2) when a J.P. Morgan entity obtains ...

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Investment

~~Tax-aware planning
and structuring - J.P.
Morgan~~

A good way to maximize tax efficiency is to put your investments in the "right" account. In general, investments that lose less of their returns to taxes are better suited for taxable accounts....

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~~Tax-Efficient
Investing: A
Beginner's Guide~~

Evidence-Based

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Aware Investing,

Estate Planning, Fee-

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Locations Primary

10600 Chevrolet

Way ...

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Prior to making any
investment or

financial decisions, an
investor should seek
individualized advice
from personal
financial, legal, tax
and other
professionals that
take into account all
of the particular facts
and circumstances of

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an investor's own
situation.

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That's one reason
why tax-aware
investment
management is
essential for building
and maintaining
wealth. In this
comprehensive,

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groundbreaking book,
Douglas S. Rogers,
CFA, explains why
many accepted
investment strategies
and techniques
developed for tax-
exempt institutional
investors don't work
for individuals who
are subject to taxes.

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~~Management: The
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Investment expense
in excess of
investment income is
carried forward and
can be treated as
interest expense in
the next tax year. Tax-
aware borrowing has
significant
advantages, but also
requires careful
consideration before

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moving forward with
the strategy.

~~Tax-Aware Borrowing
Advantages—
Investment Loan
Interest ...~~

Doug Roger's book,
Tax-Aware
Investment
Management - The
Essential Guide,
should be the
instruction manual of

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choice for those interested in minimizing tax drag for themselves or their clients. As an investment advisor / planner, one focused upon tax-aware best practices, I support Doug's work and have designed elements of it into my philosophy as well.

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Tax-Aware
Investment ...~~

Tax aware investing is the process of improving investment performance by employing advantageous tax strategies. The federal income tax has always been the greatest drag on

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investment returns,
greater than inflation,
management fees or
transaction costs, but
until recently tax
planning wasn't a
part of the investment
process.

~~Tax Aware Investing
Resources - AICPA~~
Tax-aware and
portfolio
management best

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practices often have negative implications for day-to-day investment advisory operations, including profitability.

Implementing these best practices makes each client ' s portfolio unique, which can complicate investment professionals ' ability to scale their

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Investment businesses.

Management
~~Helping Your Clients
Execute a Tax-Aware
Investment Plan~~

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defined as actively
maximizing the after
tax return an investor
receives the goal of
investment doug
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Management The
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Investment Objective.~~

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The Value Tax-Aware strategy seeks seeks total return on an after-tax basis.

Description. The strategy uses a value-driven approach and seeks to maximize after-tax total return by investing in a portfolio of investment grade, fixed income securities.

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The Essential**

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