



ECON WEALTH
MANAGEMENT

TAX PLANNING SOLUTIONS GUIDE

A GUIDE OF HOW WE PLAN FOR YOUR SCENARIO

We help coordinate tax planning strategies designed to minimize your tax liability and preserve your wealth.

Core Areas



Tax Bracket Awareness

- Coordinate with CPAs to recommend proactive adjustments based on year-end projections
- Evaluate impact of portfolio withdrawals, Social Security benefits, and other income sources
- Analyze projected taxable income and identify opportunities to remain within a target bracket



Roth Conversions

- Coordinate Roth timing with Social Security taxation
- Assess the long-term benefits of Roth assets for heirs
- Collaborate with tax professionals to estimate conversion-related obligations



Capital Gains

- Plan investment sales based off of tax impact
- Harvest losses to offset taxable gains
- Strategize asset sales to manage exposure to short-term capital gains rates



Required Minimum Distribution

- Contribution limit tracking
- Coordinate RMD withdrawals with overall tax strategy
- Calculate required minimum distributions before deadlines

Advanced Planning Services



Tax Analysis Software

Our team utilizes advanced software to model and illustrate different tax scenarios.



Delaware Statutory Trusts

We assess whether this strategy will fit your income needs.



Real Estate Investors

We work with real estate investors to coordinate investment decisions with tax and financial planning strategies.

Important Disclosures: Econ Wealth Management provides general investment education and recommendations. We do not guarantee any specific investment results. Econ Wealth may recommend third-party service providers; we do not receive compensation from such providers. Econ Wealth Management is not engaged in the practice of tax preparation or legal work and no comments should be construed as tax or legal advice. Tax and legal information provided is general in nature. Always consult a tax professional or attorney regarding your specific situation.