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.