Common Tax Planning Pitfalls

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NAPFA CE Credit: 1.5
CFP® CE Credit: 1.5

Without careful planning, our clients are always getting themselves into Tax Planning Pitfalls. In this seminar, we will highlight some of the most common mistakes our clients keep making with their taxes, how to spot these mistakes, and hopefully avoid them. We will also go over how to fix them if they occur. Topics will include IRAs, 529 Plans, Capital Gains, and Estate Planning.

Learning Objectives:

1. Identify common tax planning pitfalls
2. How to avoid them
3. What we should do to remedy them