

Tax Aware Investment Management The Essential Guide

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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 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.

[Tax Aware Investment Management: The Essential Guide ...](#)

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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.

~~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 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't ...

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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 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 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-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. When compounded over time, this can make a meaningful difference in an investor's bottom-line results. With all the uncertainty 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 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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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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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 an investor's own situation.

~~JPMorgan Tax Aware Equity Fund | J.P. Morgan Asset ...~~

That's one reason why tax-aware investment management is 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't work for individuals who are subject to taxes.

~~Tax-Aware Investment Management: The Essential Guide ...~~

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 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 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.

~~Amazon.com: Customer reviews: 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 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 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 respective businesses.

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

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Investment Objective. 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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