



**Mentor RIA Consulting**

*Allowing you to focus on what you do best*

### *Clients and Tax Uncertainty*

Taxes, like death, are among those things that are certain for all of us. However, the amount of taxes due and types of taxes which may apply can vary significantly from person to person and year to year. A great deal of energy is expended in trying to predict tax burdens, tax changes and methods of reducing or eliminating taxes. Much of that energy is wasted but some of it can produce savings – so the best approach is to avoid simple mistakes and spinning our wheels and to instead make thoughtful decisions to maximize tax savings and minimize tax exposure.

A good starting point is to understand what aspects of your tax situation you can control and act upon them. That requires consideration and knowledge of many things and suggests that you may benefit from the assistance of an experienced financial adviser and planner – not so much an investment adviser, though that is important, too. Your advisor can help you to act on those aspects of taxation that fall within your reach. In addition to general advice, your advisor can illustrate how different approaches will affect the tax burden for you, your assets and your wealth plan. Let's look at a few situations where a little thought can pay dividends.

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