nuveen
A TIAA Company

This program supports:

Client acquisition	Financial planning	Investor content

CE APPROVED
1 hour CFP, IWI (Taxes & Regulations)
CPE for CPAs

The tax calm before the storm?

Take advantage of tax certainty and plan for changes

Why participate in this program?

- Advisors and their clients have two planning seasons of relative certainty before significant changes are likely
- You can help clients plan for what they know and account for what might change
- Tax conversations may uncover additional wealth planning needs you may be able to address

For high earners, taxes can erode as much as **12%** *of retirement income*[1]

LEARNING OUTCOMES	QUESTIONS ADDRESSED	FORMAT
Confidently initiate high-value tax planning conversations	How will recent policy changes affect my client's overall tax burden?	50-minute presentation, available live and on demand
Deliver potential tax-saving strategies for any given client situation	Would my client be better off delaying some deductions this year?	Financial professional and investor versions available
Help clients maximize cumulative after-tax outcome over multiple years	Have I missed any potential tax savings for my clients?	One hour available CE credit for CFP and IWI, CPE credit for CPAs

Summary

The first step to a sound tax strategy is understanding which factors will have the biggest impact. This program is designed to enable advisors to be both forward-thinking and proactive. It provides a simple framework for helping clients identify their top tax considerations and find solutions for this year and beyond.

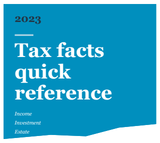
I can offer clients tax expertise, without being a tax expert.

Any change in tax policies becomes an opportunity to proactively add value.

I can help clients see and think two steps ahead.

Additional resources

These materials can support your tax planning conversations with clients.

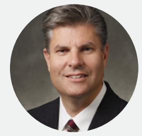


TAX PLANNING QUICK REFERENCE guide summarizes key rates and thresholds

CLIENT CHECKLIST helps guide tax planning at year end and beyond

ARTICLES focus on how advisors can put tax planning insights into action

ADVISOR EDUCATION SPECIALIST



James Bergeron, J.D.

Jim develops and delivers educational programs designed to help wealth management firms and advisory practices evolve and enhance their relationships with clients. His areas of expertise include tax and financial planning, advisor practice management, and investor education. In addition to presenting virtually and in person to audiences of all sizes, Jim is a lecturer and frequent speaker at national and international conferences, where he is often called on to demonstrate how to put wealth management concepts into action.

Contact your Nuveen Advisor Consultant today at 800.221.9271 for more information.

About Nuveen Advisor Education

Nuveen brings our financial professional partners — and their valued clients — an award-winning group of subject matter experts ready to share ideas, insights and educational programs. Whether it's a focus on enhancing an advisor's practice, acquiring new clients or current, actionable market and asset class insights, Nuveen offers timely and relevant content and programs.

We look forward to partnering with you.

IMCA 2022 STAR AWARDS WINNER OVERALL ADVISOR EDUCATION

1 Source: FEDweek.com