nuveen
A TIAA Company

**This program supports:**

| Client acquisition | Financial planning | Investor content |
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**CE APPROVED**
1 hour CFP, IWI (Taxes & Regulations)
CPE for CPAs

# Tax optimization for wealthy clients

## Why participate in this program?

- Most investors, especially the wealthiest, want help reducing their taxes
- Improving after-tax outcomes is a critical and measurable demonstration of your value as an advisor
- A strategic approach that spans multiple years can amplify the benefits of tax optimization

**73%**

*of affluent investors want help reducing their taxes*[1]

### LEARNING OUTCOMES

Confidently initiate high-value tax optimization conversations

Offer potential tax-saving solutions for any given client situation

Help clients maximize cumulative after-tax outcome over multiple years

### QUESTIONS ADDRESSED

How can I optimize tax planning for individual and business clients?

How can I amplify the value of the tax-aware approaches I'm already offering?

Have I missed any potential tax savings for my clients?

### FORMAT

50-minute presentation, available live and on demand

Financial professional and investor versions available

One hour CE credit for CFP and IWI, CPE credit for CPAs

**I can provide valuable tax-aware strategies that benefit my clients.**

**This framework is an easy way to engage my clients in valuable planning discussions.**

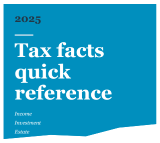
**I can help affluent clients see and plan for what's ahead.**


## Summary

By taking a multiyear view, you can identify the most tax-efficient strategy to achieve a specific financial objective, as well as the best time to implement it – maximizing available tax savings. This program provides a framework for helping clients identify their top tax considerations and find solutions for long-term tax optimization.

## Additional resources

These materials can support your tax planning conversations with clients.

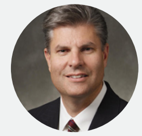



**TAX PLANNING QUICK REFERENCE** guide summarizes key rates and thresholds


**CLIENT ARTICLES** help clients appreciate the value of tax optimization strategies

**ADVISOR INSIGHTS** on using tax optimization conversations to deepen client relationships and build your business

## 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 Advisor Education delivers actionable market, asset class and practice insights and ideas to our financial professional partners and their clients. Our educational programs, events and content help advisors enhance their businesses by supporting a range of goals, including client acquisition, practice growth and client satisfaction.

1 Source: Cerulli Associates, 2025



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