

MOVE IT OR LOSE IT

MASTERING THE ART OF 2024 TAX DEFERRAL.



WHAT IS THE MOST IMPORTANT REASON TO DO YEAR-END PLANNING NOW?

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WHAT ARE THE FIVE STEPS TO YEAR-END PLANNING?

- 👁️ Gather:
- 🔍 Review:
- 📄 Decide:
- 👉 Plan!
- 🚶 Take Action:



WHERE CAN I FIND INVESTMENTS FOR MY TAX STRATEGY?

http:// 



HOW CAN I USE APARTMENT SYNDICATIONS IN MY TAX STRATEGY?

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HOW CAN I USE OIL AND GAS IN MY TAX STRATEGY?

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DOES PROVISION SUPPORT IRA/401(K) DISCOUNTING IN THEIR CLIENTS' TAX STRATEGY?

Yes No



WHAT ARE MY TOP TWO GOALS FOR 2025 INTO 2030?

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MY NEXT STEPS THIS WEEK:

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NOTES:

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