

Investor Insights | February 2025

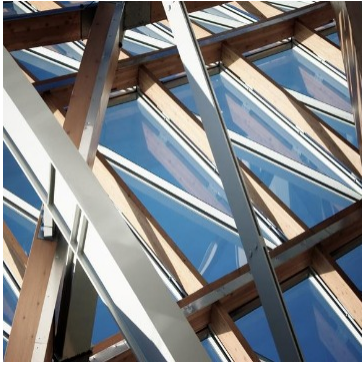
## Is It Time to Plan for New Tax Rules?

Legislative negotiations could bring changes to the U.S. tax code. That's why now may be a good time to consider tax-efficient investing.

[5 Strategies to Consider](#)
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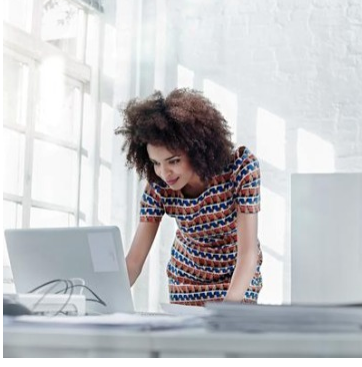
### Gearing Up for Tax Day?

February brings a focus on financial foresight. [Are you ready for tax day?](#) Start preparing early. Plus, [avoid common tax scams with our safety tips](#) and learn more from a top Morgan Stanley strategist [regarding portfolio diversification in 2025](#).



#### Tips to Prep for Tax Day

The sooner you get started, the better prepared you'll be this tax season. Use these tips to help prepare.

[Your Checklist](#)


#### Help Protect Yourself from Tax Scams

Consider using secure filing websites, creating strong passwords and learn to recognize the warning signs.

[Get More Tips](#)


#### Outlook 2025: A Case for Portfolio Diversification

Wealth Management's Lisa Shalett says a more diversified investment strategy could offer better risk-adjusted returns.

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