



Investor Insights | November 2025

3 Tax Question Every Investor Should Ask

As you build and preserve your wealth, it's important to consider how income and capital gains taxes can influence your overall financial strategy.

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Your Year-End Tax Checklist

As we head into the holiday season, you're probably creating a mental list of the tasks you need to complete by year-end. Keep tax planning top of mind as you review your [income and portfolio](#), [retirement savings](#), [charitable giving](#) and [estate plan](#).



Minimizing Taxes on Retirement

Discover how tax-efficient withdrawal strategies can help minimize taxes on your nest egg.

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Tax-Smart Way to Manage Your Giving

Are you making another list for gifts? Consider how a Donor Advised Fund can help you achieve philanthropic goals.

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Estate Planning Essentials

One of the last areas of your checklist should be a review of your estate plan.

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