

Solutions & Resources: Income Tax Planning Services

At Domani Wealth, we strive to see tomorrow the way you do. That's why we start each conversation by asking, "What does your tomorrow look like?"

To answer that, we've compiled some thoughtful questions to help you plan for the future and to gain insight on the services and experience we offer as an independent wealth advisory firm. Because at Domani Wealth, our focus is to lead you to a tomorrow filled with possibilities.

Are your taxes a liability or an opportunity?

Strategic income tax planning is one of the most effective ways to enhance your family's wealth. Without the assistance of a qualified professional, it can be a tough task.

Coordinating with your tax advisor, the experienced team at Domani Wealth will analyze your financial and tax situation and provide a personalized strategy by

- Constructing a diversified and tax-efficient portfolio
 - Identifying charitable giving opportunities including the use of appreciated securities, private foundations, donor advised funds, and charitable trusts
 - Harvesting portfolio gains and losses, when appropriate
 - Converting traditional IRAs to Roth IRAs
 - Deferring or accelerating income recognition
 - Evaluating your existing annuities, if any
 - Establishing and funding IRAs and qualified retirement plans
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It is difficult to create a thorough financial or investment plan without considering the impact of taxes. Our Domani Wealth team has CPA's on staff with significant experience working directly with businesses and individuals and other tax professionals to help clients understand tax ramifications and create more tax efficient plans.

Tomorrow's wealth starts with planning today.



Minimize your tax burdens. Maximize your opportunities. Let our experienced professionals help you keep more of your hard-earned money working for you.

IMPORTANT DISCLOSURE INFORMATION

Past performance may not be indicative of future results and different types of investments involve varying degrees of risk. Therefore, it should not be assumed that future performance of any specific investment or investment strategy (including the investments and/ or investment strategies recommended and/or undertaken by Domani Wealth, LLC), advice, or any non-investment related services, will be profitable, equal any historical performance level(s), be suitable for your portfolio or individual situation, provide security or prove successful. Domani Wealth is neither a law firm nor accounting firm, and no portion of its services should be construed as legal or accounting advice.

Please remember that it remains your responsibility to advise Domani Wealth, in writing, if there are any changes in your personal/ financial situation or investment objectives for the purpose of reviewing/evaluating/revising our previous recommendations and/or services, or if you would like to impose, add, or to modify any reasonable restrictions to our investment advisory services.

The scope of the services provided depends upon the needs of the client and the terms of the engagement.