



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



Harvesting portfolio gains and losses, when appropriate



Deferring or accelerating income recognition



Identifying charitable giving opportunities, including the use of appreciated securities, private foundations, donor-advised funds, and charitable trusts



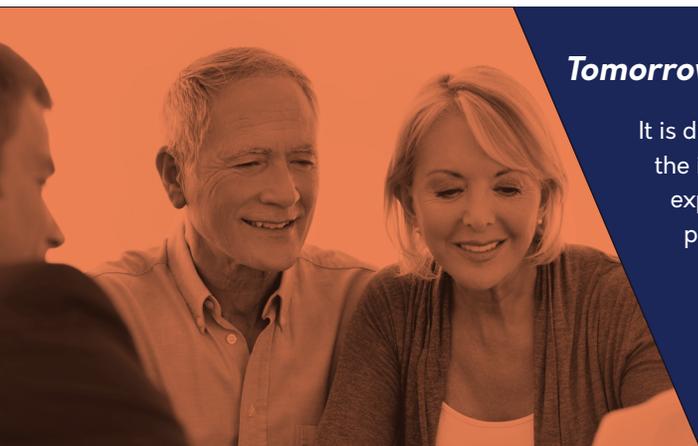
Establishing and funding IRAs and qualified retirement plans



Converting traditional IRAs to Roth IRAs



Evaluating your existing annuities, if any



Tomorrow's wealth starts with planning today.

It is difficult to create a thorough financial or investment plan without considering the impact of taxes. Our Domani Wealth team has CPAs 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.

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.

A copy of our current written disclosure Brochure discussing our advisory services and fees is available upon request. The scope of the services provided depends upon the needs of the client and the terms of the engagement.