

As we enter the 4th quarter, it's important to start planning for your 2022 taxes. Try to make the most of deductions and strategies available to minimize your tax burden. Listed below are 5 tax planning tips that may reduce your tax obligations in the new year.

- Explore tax-advantaged accounts
 - 401K
 - 529 Plan
 - IRA
 - Health Savings Account
- Consider Charitable Giving
- Explore Roth Conversions
- Analyze Capital Gains/Harvest Losses
- Remember your Required Minimum Distributions (RMDs)

You are encouraged to contact your financial manager or Twinbridge to discuss these tips and other possible tax-planning tools.



**Building and protecting
your wealth.**

THE BOTTOM LINE

Twinbridge helps clients achieve their financial goals through a network of carefully screened managers who are experts in their fields and have dedicated research analysts to support portfolio decisions. Generally, there is no fee for the initial consultation as well as the on-going services:

- Evaluating your financial situation
- Selecting a financial manager
- Working to achieve your financial goals
- Maintaining & enhancing your current lifestyle
- Partnering with you for the long term

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