

2022 Financial Services Year-End Tax Planning Guide

December 9, 2022



As we go to press with our annual year-end tax planning guide, we can look back at a challenging year, both economically and in terms of tax planning. This past year has shown how the impact of high inflation and market volatility can alter how we live and how we do business. Staying one step ahead in this environment means **being informed** by understanding the current rules, **being flexible** by keeping abreast of potential changes, and **being ready to act** by starting to prepare for what might come.

This guide offers a variety of strategies for reducing your taxes in the current tax environment. Use it to identify the best strategies for your situation with your tax advisor, who also can keep you apprised of any new tax law developments that might affect you. With many facing difficult and uncertain times, solid financial and tax planning is required now more than ever before. The sooner you focus on your tax situation and the available tax planning opportunities, the more likely you are to put yourself in a better tax position. While we cannot predict the future, we can assist you with your tax planning.

[Click here](#) to read this year's tax planning update. Please contact [E. George Teixeira](#), [Jeffrey Kahn](#), [Jinal Shah](#) or your Anchin Relationship Partner should you have any questions about year-end tax planning.