

Past [Stock] Losses Offer Winning Opportunities

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Supreme Court Ruling Impacts Business Owners

In the *Tibble v. Edison International* case, the U.S. Supreme Court ruled there was not statute of limitations on fiduciary responsibility for 401(k) plans. Learn more about the [ruling and its impact here >>](#)



Tips for Deducting Losses After a Disaster

If you suffer damage to your home or personal property, deducting losses you incur may be an option on your federal income tax return. Here are some things you should know about [deducting casualty losses](#).



Moved South But Still Taxed Up North

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September Tax Calendar

Employer, individual, withholding, estate and trusts, and information returns. Check out details on our [Tax Calendar](#).



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Despite the up-and-downs in the stock market, gains and losses are not taxed equally. Here are [several examples](#) to demonstrate this.

The Importance of Updating Beneficiary Designations

You're busy. But there are some things that are just too important to put on the back burner, like beneficiary designations. [Don't](#)

Migrating to a low-tax state to retire doesn't always allow people to escape estate and inheritance taxes in the states they left. For a retired snowbird, avoiding estate or inheritance taxes up north is not as simple as it would seem.



Sometimes the individual didn't cut enough ties to the old state, so he or she is still considered a resident. Learn more about [cutting those northern ties to avoid taxes here >>](#)

Double Duty Giving With Charitable Gift Annuities

If you are charitably inclined, you may wish to consider charitable gift annuities, which can combine the benefits of an immediate income tax deduction and a lifetime income stream. Learn more about these [annuities and how they can save you tax money](#).

[be like William](#), avoid the pain his wife experienced.

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