

**Subject:** ADV: Important Tax Information

## 2024 TAX INFORMATION

*November, 2024*

As we approach year end, we wanted to bring your attention to an important issue relating to income taxes and your taxable portfolio(s).

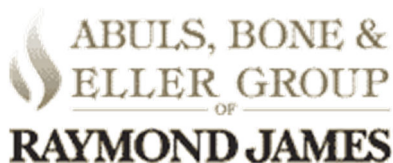
Based on early estimates, we are anticipating above average capital gain distributions from taxable portfolios relative to 2022 and 2023.

What you can do –

- Contact us near year end, we can provide an estimate of portfolio taxable income and capital gains.
- Review your tax returns or consult with your Tax Advisor to compare year over year income along with your safe harbor withholding.
- If needed, make a 4<sup>th</sup> quarter estimated tax payment by or on January 15, 2025 to avoid any potential under withholding penalties.

Please reach out to your Tax Advisor with the necessary information and don't hesitate to contact us with any questions or comments.

\*Raymond James and its advisors do not offer tax advice. You should discuss any tax matters with the appropriate professional.



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