



Tax Efficiency Check Up!

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	Buy	Hold	Change	Sell	Die
Stock	After Tax	Taxable Dividends	Taxable Gain	Taxable Gain	Estate Tax Probate
Mutual Funs	After Tax	Taxable Dividends	Taxable Gain	Taxable Gain	Estate Tax Probate
Qualified Plans	Tax Deductible	Tax Deferred	Tax Deferred	Taxable	Taxable Probate
Annuities	After Tax	Tax Deferred	Tax Deferred	Taxable	Taxable NO Probate
Life Insurance	After Tax	Tax Free	Tax Free	Potential Tax Free Loans	Tax Free NO Probate

For further information on our Tax Planning services, please contact JCG Private Wealth Management at Jeffrey.Goodrich@LPL.com.

At JCG Private Wealth Management we strive to provide solutions that create lasting value for our clients.

LPL Financial does not provide tax or legal advice. We suggest that you discuss your specific situation with a qualified tax or legal advisor. Content in this material is for general information and is not intended to provide advice or recommendations for any individual.

Jeffrey Goodrich is a financial advisor with and securities and advisory services offered through LPL Financial, a Registered Investment Advisor. Member FINRA/SIPC.



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	Annual Dividends on Line 6 of 1040	Annual Capital Gains on Line 9 of 1040	Tax on Change of Investment Option	Tax on Rebalancing	Eligible for Tax-Free Exchange Under Sec. 1035	Tax on Sale, Redemption, Liquidation	Tax Free Loans	Subject to Estate Tax Upon Death	Eligible For Use Under Annual Gift Exclusion
Stocks	YES	NO	YES	YES	NO	CAPITAL GAINS	NO	YES	YES
Mutual Funds	YES	YES	YES	YES	NO	CAPITAL GAINS	NO	YES	YES
Variable Annuities	NO	NO	NO	NO	YES	ORDINARY INCOME	NO	YES	YES
Life MEC	NO	NO	NO	NO	YES	ORDINARY INCOME	NO	NO	YES
Life 7-Pay	NO	NO	NO	NO	YES	ORDINARY INCOME	YES (POTENTIALLY)	NO	YES

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