

## 2017 Tax Reference Guide Wsfinancialpartners

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Gift tax annual exclusion \$14,000 Estate and gift tax rate 40% Estate tax exemption \$5,490,000 \$5,490,000 GST

## ~~2017 Tax Reference Guide — Lenz Financial Group~~

2 2017 Tax Reference Guide 1 INCOME TAXES Tax planning should always start at the individual level. No matter where your business, investment or employment income is earned, it will eventually be taxed on an individual return. Your individual income is taxed at different rates and in different ways, depending on the type of income.

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If income tax bracket is 10% or 15% 0% If income tax bracket is 25%, 28%, 33%, or 35% 15% If income tax bracket is 39.6% 20% (Short-term capital gains are taxed at income tax rates) Medicare contribution tax on investment income 3.8% Tax is applied to the lower of net investment income or modified adjusted gross income (MAGI)

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TIAA Wealth Planning Strategies—2017 Quick Tax Reference Guide Long-Term Capital Gains and Qualified Dividend Rates. Tax bracket or taxable income Long-term capital gain and qualified dividend rate 0 - 15% Tax bracket 0% 25% - 35% Tax bracket 15% 39.6% Tax bracket 20% Other long-term gains rates Gains on collectibles Maximum 28% Unrecaptured 1250 depreciation Maximum 25%.

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Western & Southern dates back to the founding of The Western and Southern Life Insurance Company in 1888. 1 An annuity contains guarantees and protections that are subject to the issuing insurance company's ability to pay for them. But these guarantees don't apply to any variable accounts that are subject to investment risk, including possible loss of your principal.

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Tax season may be a backward looking chore, but it's also a good time to plan. In this guide we offer timely tips on both filing your 2016 return and making the most (this year and in the future ...

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## ~~2017 Quick Tax Reference Guide — PRW Wealth Management~~

A Reference Guide for the New Year Contribution Limits, Tax Rates, and More for 2017 Every year the IRS announces numerous changes to contribution limits and tax rates that are important to know for investing and tax planning purposes. Similar to 2016, the changes for 2017 are modest, with many figures remaining the same.

## ~~2017 Tax Reference Guide | Manning & Napier | Rochester, NY~~

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