

# TAX PLANNING



DONALDSON  
CAPITAL MANAGEMENT

## A FORWARD-LOOKING APPROACH

We believe good tax planning is about more than gathering deductions at tax time. It's about taking a proactive, year-round approach that aligns with your broader financial goals.

As part of your financial plan, we take the time to thoroughly review your past tax returns and project future income. This allows us to uncover potential opportunities for tax savings both now and in the years ahead.

Whether it's optimizing your investment strategy, planning charitable contributions, or managing income distributions, our goal is to help you make informed decisions that support your long-term success.

*Interested in seeing how this comes together?*

Ask your advisor for a sample report.



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