



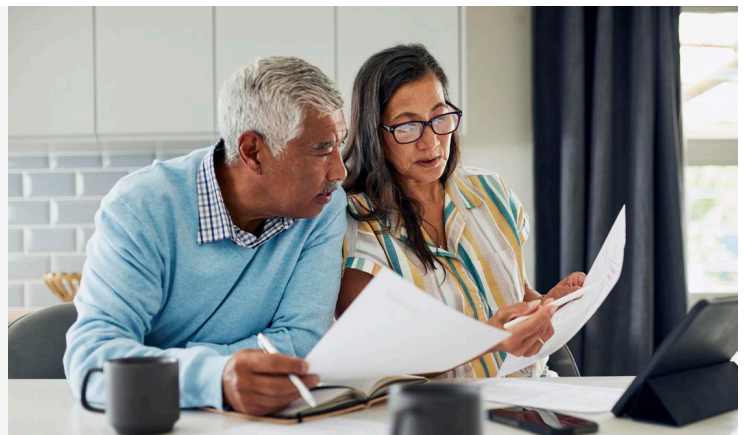
Tax Planning Opportunities Before the Tax Cuts and Jobs Act Sunsets



by Martin Schamis
Vice President & Head of Wealth Planning

TAX PLANNING

In 2017, The Tax Cuts and Jobs Act (TCJA) of 2017 brought sweeping changes to the individual tax code—but it's slated to sunset at the end of 2025. Now is the time to understand those implications and consider strategies to help mitigate the potential tax risks.



The Tax Cuts and Jobs Act (TCJA) of 2017 brought changes to the tax code for both businesses and individuals, but if Congress fails to act, these changes are set to expire on December 31, 2025.

Watch as Martin Schamis, Janney's Vice President, Head of Wealth Planning, explains what this may mean to you as an individual taxpayer—and learn about strategies you may want to consider to help navigate possible tax risks.

[Click to watch video](#)

Working With Janney

Depending on your financial needs and personal preferences, you may opt to engage in a brokerage relationship, an advisory relationship or a combination of both. Each time you open an account, we will make recommendations on which type of relationship is in your best interest based on the information you provide when you complete or update your client profile.

If you engage in a brokerage relationship, you will buy and sell securities on a transaction basis and pay a commission for these services. Our recommendations for the purchase and sale of securities will be based on what is in your best interest and reflect reasonably available alternatives at that time.

If you engage in an advisory relationship, you will pay an asset-based fee, which encompasses, among other things, a defined investment strategy, ongoing monitoring, and performance reporting. Your Financial Advisor will serve in a fiduciary capacity for your advisory relationships.

For more information about Janney, please see Janney's Relationship Summary (Form CRS) on www.janney.com/crs which details all material facts about the scope and terms of our relationship with you and any potential conflicts of interest.

By establishing a relationship with us, we can build a tailored financial plan and make recommendations about solutions that are aligned with your best interest and unique needs, goals, and preferences.

Contact us today to discuss how we can put a plan in place designed to help you reach your financial goals.