



## Tax-Aware Investment Management: The Essential Guide

By Douglas S. Rogers CFA

Bloomberg Press. Hardcover. Book Condition: New. Hardcover. 301 pages. Dimensions: 9.4in. x 6.2in. x 1.2in. Investment returns are uncertain, especially in today's economic environment. But taxes are a sure thing. That's one reason why tax-aware investment management is essential for building and maintaining wealth. In this comprehensive, groundbreaking book, Douglas S. Rogers, CFA, explains why many accepted investment strategies and techniques developed for tax-exempt institutional investors don't work for individuals who are subject to taxes. They will end up with substantially lower after-tax returns simply because their portfolios are not structured or managed with tax obligations in mind. This book shows: How to measure and compare the tax-efficiency of mutual funds, hedge funds, and individual investment managers How the widely used style-box matrix can prove detrimental to after-tax investment returns How to minimize taxes on stock-and-bond portfolios and employ sophisticated strategies for offsetting gains against losses How to decide which asset categories should be placed in tax-deferred accounts such as IRAs and which should be placed in regular taxable accounts How to incorporate tax-aware techniques and insights into all facets of investment planning, portfolio management, and estate planning This item ships from multiple locations. Your book may arrive from Roseburg, OR, or La Vergne, TN. Hardcover.



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