

Tax Planning

Implementation Guide



MAGELLAN
FINANCIAL



Tax Planning

Campaign Overview

Who This Guide Is For

It is designed to help you confidently implement the Quarter 1 Campaign - Tax Planning with the provided emails, media scripts, and client-facing tools, and to support natural conversations with current and prospective clients.



How To Use This Guide

Use this guide as an internal playbook. It outlines when and how to introduce the tax planning topic, how to position the campaign assets, and how to move conversations forward without providing tax advice or making predictions.





Purpose

This initiative is designed to help you introduce proactive tax planning conversations into a broader retirement planning process. The focus is on education, awareness, and evaluating how future taxation may affect income, flexibility, and long-term outcomes.

Core Objective

Encourage review meetings, increase client engagement, and help clients understand retirement taxation before income decisions become difficult to change.

Key Message

Retirement taxes are often driven by future decisions and future tax environments, not past tax returns.



Ideal Timing

Ongoing, with particular relevance for pre-retirees, early retirees, and clients approaching income decisions.

Primary Audience

- Pre-retirees
- Retirees beginning income distributions
- Clients with significant qualified retirement assets

What Is Included

COMPONENT	DESCRIPTION	GOAL
Client Conversations Guide	Structured conversation angles and talking points	Equip you to lead confident tax discussions
Email Campaign	Educational, tax-focused messaging	Drive awareness and review requests
Media Scripts	30 and 60 second radio, TV, and video content	Reinforcing proactive tax framing
Client Tools	Tax Calculator, Roth Readiness Quiz, Tax Guide	Support education and scenario evaluation

How Advisors Should Position Tax Planning

Tax planning should be framed as:

- Educational rather than predictive
- Forward-looking rather than reactive
- Focused on flexibility and trade-offs rather than outcomes

The goal is to help clients understand how different tax environments may affect retirement income over time, not to recommend specific actions.

Approved Tool Flow

1. Introduce how retirement taxation differs from filing a tax return.
2. Use the Tax Calculator to illustrate potential future tax exposure based on current assumptions.
3. Introduce the Roth Readiness Quiz as an evaluative tool rather than a recommendation.
4. Provide the Tax Planning Guide for continued education.

What This Is and Is Not

This Is:

- Education
- Scenario evaluation
- Coordination Support

This Is Not:

- Tax advice
- Legal advice
- A prediction of future tax law





Suggested Rollout Timeline

Suggested Rollout Timeline:

- Week 1: Internal review and advisor preparation
- Week 2: Email launch and initial media content
- Week 3: Follow-up conversations and tool engagement
- Week 4: Review meetings and planning discussions



Success Metrics

- Review meetings scheduled
- Tool usage and downloads
- Client engagement during reviews
- Media and email response rates

Campaign Version | *Optional*

Campaign Title Options:

- Tax Planning Beyond the Return
- Planning Taxes Through the Front Windshield
- Retirement Taxes, Revisited

Tagline Options:

- Because some decisions are easier before income begins.
- Understand the trade-offs before flexibility narrows.
- Planning ahead when options still exist.

