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Wealth and Taxes: The Potential Benefits of Municipal Bond Investing.

“Once you reach a certain level of wealth, the conversation shifts. We aren’t talking about accumulating anymore; we’re talking about preserving.”

This is how Nick Goetze, managing director of Fixed Income Solutions at Raymond James, frames things when he talks about bonds. And when it comes to preserving your wealth, some bonds are built differently.

“The first priority with bonds is principal preservation,” says Nick. “In certain high-tax situations, individual investment-grade municipal bonds can be one of the better options to accomplish that goal.”

Tax appeal

Issued by city, local and state governments, municipal bonds are loans used to build infrastructure – road expansions, new hospitals, school improvements, water and sewer maintenance, etc. What makes them an attractive opportunity for high-net-worth investors is how they are – or aren’t – taxed.

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