

SDR Tax Studio



Connecting tax-sensitive decisions, timing, and professional review

SDR (Strategic Decision Review) connects decisions across your professional team. Tax Studio applies that governance to tax-sensitive matters, organizing facts, dependencies, and timing across investment, retirement, business-sale, and estate decisions. Your qualified professionals evaluate strategies and provide advice; you retain decision authority.

DECISION COVERAGE

Investments

Organize holdings, basis, timing, and liquidity questions for review by your investment and tax professionals.

Business sale

Identify pre-transaction review dependencies and decision windows before binding commitments narrow the options.

Retirement

Map income timing, withdrawal, and conversion questions for professional analysis alongside spending needs.

Estate and giving

Connect ownership, transfer objectives, and charitable intent for review by qualified tax and estate counsel.

The SDR Governance Layer

The difference is SDR governance. It connects tax-sensitive decisions to the wider picture: what must happen first, what each choice may change elsewhere, and when changed circumstances call for another review. The result is a documented decision roadmap: connected questions, a review sequence, and clear professional responsibilities. Qualified professionals determine tax treatment and advise on specific strategies.

DECISION FRAMEWORK

01

Uncover opportunities
Organize objectives, holdings, reported tax basis, cash flows, and existing plans.

02

See the after-tax impact
Organize professional analyses of after-tax effects, costs, risks, and liquidity.

03

Build confidence to act
Route assumptions and eligibility questions to the advisor, CPA, and attorney for validation.

04

Put decisions in the right order
Record dependencies, review dates, responsibilities, and client decisions.

05

Stay ahead of change
Revisit the decision map after material life, market, or transaction events.

CLIENT DELIVERABLES

Decision brief

Client objectives, alternatives, information gaps, and questions for professional review.

Decision roadmap

Dependencies, review dates, assigned responsibilities, and approval checkpoints.

Scenario comparison

Professional analyses, documented assumptions, costs, and sensitivities.

Review record

Source inputs, professional conclusions, client decisions and review triggers.

Before you act

Ask your professionals to distinguish tax deferral from tax reduction and explain costs, risks, cash needs, and effects on future choices.