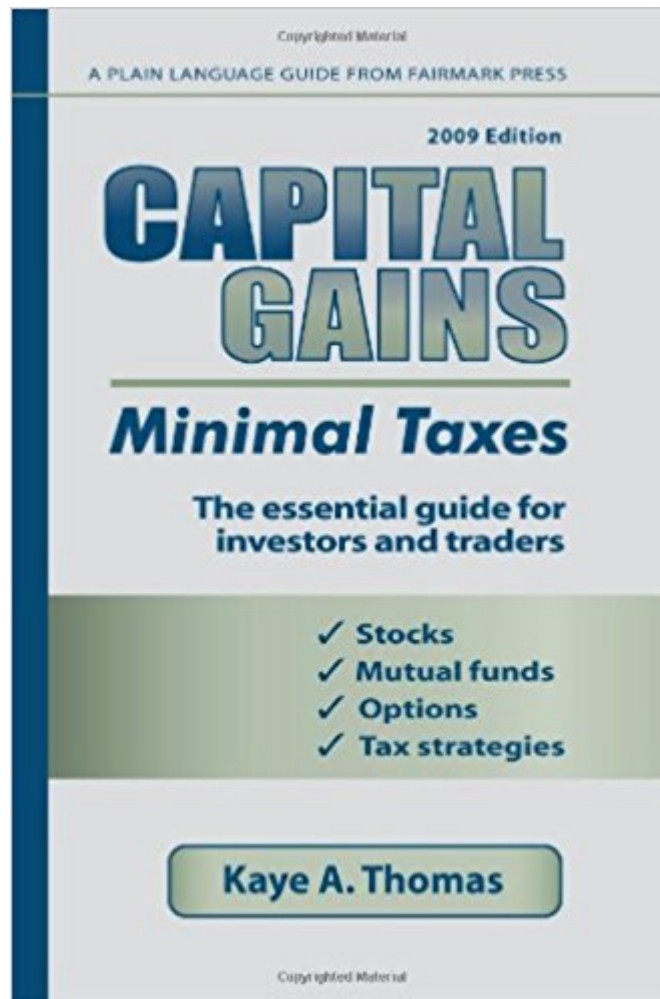


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# Capital Gains, Minimal Taxes 2009: The Essential Guide For Investors And Traders



## Synopsis

Note: a more current version of this book is available. If you buy or sell stocks, mutual funds or options, you need to handle your taxes like a pro. This book makes it easy to understand the rules and the best strategies for minimizing taxes. It starts with the basics but goes on to provide a plain language explanation of rules for short sales and other advanced techniques, and covers the special rules that apply to traders. This edition covers legislative changes through 2008 and other important developments.

## Book Information

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## Customer Reviews

This is probably the best book out there for the tax treatment of the following investment topics: stocks, options, short sales, wash sales, mutual funds, and dividends. I keep this book next to my computer and refer to it often. It has many examples. It even covers more advanced topics such as constructive sales and straddles. It has sections on the taxation of traders, gifts, accounts for minors, and AMT. It covers all of these topics accurately and thoroughly, while still being very readable for the non-tax professional. The author points out any grey areas of the tax law. This book isn't perfect (for example, in the section on estimated taxes, it doesn't mention form 2210 or what to do if unexpected income comes late in the year), but it is still very good.

Kaye Thomas' *Capital Gains, Minimal Taxes: The Essential Guide For Investors And Traders* is a "plain language" guide to stocks, mutual funds, options, and tax strategies for maximizing returns and minimizing tax liabilities. Complete, authoritative, practical, "user friendly", this guide is ideal for

those new to investment portfolio management and will prove both practical and invaluable in creating a personal financial investment plan with allied strategies. Indeed, Capital Gains, Minimal Taxes has much of value to offer even experienced investors with respect to tax rules for short sales, stock options, and "straddles". Highly recommended reading for sensible small investor strategic financial and investment planning.

It is very clear and accurate in explaining the rules. It is not very clear in certain chapters like Alternative Minimum Tax, or quantifying, even approximately, who can pass the trading activity test. It would have been very useful to give a definition of each rule, in a few lines, so the reader does not have to go back and read an entire chapter just to refresh his/her memory about a rule.

I am looking at paying a lot of Capital Gains and was looking for ways to minimize it. While this book explains the various ways to could have capital gains and pay taxes, I didn't see anything new or creative about how you could save on capital gains. There is a 2 page chapter on gifting appreciated stock to charity, but nothing about creating trusts, estate planning or other strategies to shelter capital gains. There is some info for day traders, but I am an investor, and fairly tax savvy. This book was not helpful for me, it is basic stuff.

Really, really gave me a great understanding of how trader taxes work. If you are a trader there are a zillion ways to screw up your return and only one way to get it right. So be super cautious. As the book states, many CPA just don't know how to do trader taxes. A must read "BEFORE" you even start trading.

I didn't see the one thing I was looking for, the thought about putting an option on an owned stock and its effect on short term-long term holding status.

I like the way book breaks out information for various businesses. 1. Information for part-time traders or business. 2. How to properly identify your status for tax purposes. 3. Advantage of one tax status over another. 4. Information concerning other resources for study.

This book is the most complete, accurate, and easy to understand guide out there. I keep this book next to my computer and refer to it often. It covers in detail capital gains on stocks and options, short sales, wash sales, mutual funds, and dividends. It even covers more complicated strategies

such as constructive sales and straddles. It has many examples. It has sections on taxation for traders, tax rules for gifts and minors, and AMT. It is accurate and thorough, yet explains things in a way that non-tax professionals can understand.

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