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Net Unrealized Appreciation

Net unrealized appreciation, or NUA, is a tax strategy that can help reduce your tax bill if you have company stock in your employer-sponsored retirement plan. By utilizing NUA, you pay income tax on only the original cost basis of the stock, plus the more favorable long-term gains tax on the appreciated portion. Watch this video to learn how NUA works and some first steps you might consider.

To download a copy of the transcript, [click here](#).

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