

How do I view the tax implications of my holdings?

Sometimes it's difficult to decide whether to sell a short-term holding today when the price is high, or wait until it becomes a long-term holding and thus subject to a smaller tax liability. The Tax Implications view in the Quicken Portfolio can provide the information you need to make such a decision.

For example: If your lot was purchased less than a year ago, and you sold it today, it would be taxed at the short-term capital gains tax rate. If, instead of selling, you held the stock until the end of the short-term holding period (a year from the date you bought it), and then sold it, that same lot would be taxed at the lower long-term capital gains tax rate. Assuming the price doesn't fall drastically, you could save money on taxes and keep more of the profits. (Tip: Use the [Capital Gains Estimator](#) to try out different tax scenarios.)

1. Click the **Investing** tab.
2. If necessary, click the **Portfolio** button at the top of the page.
3. From the **Show** list, select **Tax Implications**.
4. If necessary, click the arrow icon next to the account name to see all of the securities in the account.
5. To view the tax implications for your open [lots](#), click the plus sign next to an individual security.
6. Roll your pointer over the column headings to see a brief explanation of each tax term, or see the complete explanation of [column headings](#).

Notes

To learn more, see [Estimating capital gains before selling](#).

Quicken relies on accurate and complete data to derive reliable performance measures. To view certain performance measures, it may be necessary first to [replace placeholder entries with complete historical data](#).