

REPOSITION FOR A BETTER FUTURE. NOW.



The SECURE Act inserted a tax time bomb into retirement accounts. What are You Going to do About it?

HERE ARE 3 SIMPLE, YET CRITICAL QUESTIONS TO THINK ABOUT:

1. Who do you want to make your primary beneficiary, your immediate family or Uncle Sam?
2. How much of your IRA account do you think will be lost to taxes?
3. How do you plan to get the money out without paying the highest possible tax?

Attend one of our FREE 30 Minute Online Workshops:

Tuesday June 9th 8:00am Click on the link below to register for this session:
https://us02web.zoom.us/meeting/register/tZluf--upzljGtlp5xKOxbWe8_U9yQsI1Sgb

Thurs. June 11th 12:15pm Click on the link below to register for this session:
https://us02web.zoom.us/meeting/register/tZ0lcuysrDspGNZsnwjff2tHKj4b_qtUqzJC

Wed. June 17th 12:15pm Click on the link below to register for this session:
https://us02web.zoom.us/meeting/register/tZYodeGhrTMrHNebVyH_28bo_mVJrSD3s9wE

Thurs. June 18th 8:00am Click on the link below to register for this session:
<https://us02web.zoom.us/meeting/register/tZcpdO2hrTlrHtx4fKB3sybXOyw0A3KnkOnN>

Learn how tax efficiency of wealth transfer strategies for qualified assets changed under the SECURE Act with elimination of the Stretch IRA:

Learn about the alternate strategies that may provide better results:

Tax Savings:

Use IRS Safe Harbor rules to reduce the tax liability on retirement Accounts

Peace of Mind: Eliminate downside market risk

Flexibility: Eliminate RMDs. *Your legacy on your terms.*

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