



6 Life-Changing Financial Questions While Planning For Your Retirement

1. What planning have you done to create tax-free income in retirement?
2. Did you know that capital gains, as well as estate taxes, can be optional?
3. Do you have planning in place to guarantee an income for the rest of your life?
4. What have you done to protect yourself and family assets from lawsuits, liens, and judgments?
5. Did you know the IRS will give you a tax deduction today for a charitable gift that you don't make until after you and your spouse pass away?
6. You received tax deductions along the way investing in your IRA. Since the taxes were deferred, they were also compounded. What have you done to reduce the taxes owed on your IRA in retirement or once inherited?

If you don't know the clear answer to each one of these questions, it may be in your family's best interest to schedule an introduction consultation with us. By being able to have clear solutions and planning, you may not only protect your assets, but also increase your confidence in retirement by maximizing you income and net worth dramatically.

Find out for yourself how we stand out from other firms and how we've gone the extra mile to save families millions of dollars and if you may qualify for our planning services.