

Indexed Pitches – Less than a Minute

Retire Tax Free

As a business owner you can retire tax free, but you must make the elections! Can we make an appointment to discuss your retirement plans?

Triple Threat

At retirement your 401k (or other retirement account) payouts could be reduced 50% or more by taxes, inflations and hidden charges. You can protect yourself and collect 100% of your retirement dollars, but you must make the elections during your working years. If you wait until your retirement, it will be too late. My firm specializes in maximizing retirement dollars. Can we meet next Friday or would Wednesday be better?

65% of Gains

If I could show you how to get 65% of the stock markets gain and be completely protected from any of its losses, would you be interested in hearing more? What if I said you could get the gains, tax free? Would you want to talk further?

Two Ways to Accumulate Funds

There are two ways to accumulate funds for (during) retirement: investing and savings.

Historically, in the long run, investing has provided the highest return, but it does involve the assumption of risk - the chance that you could lose some or all of your investment.

On the other hand, in a savings account your money is protected from market risk and a financial institution guarantees that you can not lose your principal.

There are many kinds of savings. The one that many of clients choose is called an indexed account. It is a savings account issued by an insurance company and it pays

- A guaranteed minimum interest rate;
- An Interest Bonus based on stock market performance (if any);
- and your funds accumulate tax free.

Are you interested in tax free accumulations? How are you planning for retirement? (How are you managing your retirement nest egg?)