National Practice Group
Team Name

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Tax planning and your retirement

Join us for a presentation about recent tax-law changes and how they may impact you

This educational event helps position you to make the most informed decisions for you and your family as you uncover strategies that may help reduce the taxes you pay in retirement. We will cover these key topics:

- Protecting your savings from the impact of rising taxes in the future.
- Taking advantage of new tax rules before they expire.
- Creating a source of tax-free income with Roth IRAs and Roth conversions.
- How a higher income affects Medicare premiums and taxes on Social Security.
- Managing your overall tax liability with tax-advantaged and tax-free investments.
- Using a health savings account to help save more for retirement.
- Beneficiary planning and its importance when leaving retirement assets to heirs.

Event details

[Date
Time
Location]

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