

Why does Dave
look so
surprised?



Because he just discovered the potential of a *Roth Conversion!*

Dave worked hard to save for his golden years using his workplace retirement plan and traditional IRAs, since both offered significant tax advantages. Then he found out he was eligible to convert that traditional IRA to a Roth IRA, and now he can take future withdrawals TAX-FREE.* Dave is making those well-earned dollars work harder for him...see if you qualify to do the same.

Be like Dave. Call today!

* Although qualified withdrawals from a Roth IRA are tax free, when converting a Traditional IRA into a Roth IRA, the entire converted taxable amount is reportable as income in the year of conversion.

Respond and learn how insurance can be used in various planning strategies for retirement. This material is not intended to provide, and should not be relied upon for, accounting, legal, tax or investment advice. 15253 320039