

ROTH IRAs

Retirement Can Be Less Taxing

Roth IRAs: Retirement Can Be Less Taxing is a 30-minute seminar designed to educate investors about the opportunity to gain tax-free income in retirement. The seminar covers differences between traditional and Roth IRAs, the benefits of Roth IRAs, and the tax consequences associated with converting to a Roth IRA.

OUTLINE

Welcome/Key Steps to Financial Success

Seminar Overview

Traditional IRA vs. Roth IRA

Benefits of a Roth IRA

Questions to Consider Before Converting to a Roth IRA

Scenarios

Summary/Close

Q&A/Thank You

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