

INNOVATIVE TAX PLANNING FOR BUSINESS OWNERS

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How to significantly reduce your taxes, boost your savings, protect your assets, and create a tax-free health care fund in retirement in one strategy

PROBLEM



1 Most business owners face two big problems - taxes and saving for retirement. They may not know all the plans available or if they are maximizing tax reduction strategies.

GOALS & OBJECTIVES



2 **Help Reduce** Income Taxes
Seek Asset Protection from Creditors
Fund for Retirement
Protect their family in the event of a death or disability

STRATEGY



3 +Increase retirement funding from \$30,000/year to \$200,000/year, for 10 years.
+Convert account in year 10 for enhanced growth.
+Tax Trifecta - tax deduction, tax deferred growth, and tax free distributions for medical expenses.
+Death Benefit, if elected
+FLEXIBILITY - A plan that meets their goals

POTENTIAL RESULTS



4 +Annual tax savings of \$85,000
+Accumulated retirement assets of \$3,000,000
+\$594,000 of tax free assets - if used for medical expenses

Find out if you qualify for this strategy*

Our team is comprised of wealth advisors, CPAs, and tax experts that understand the tax code and helps our clients save more money on taxes, accumulate more money for retirement, and protect their family from a death or disability.



Call today at
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We will review your current plans and have you take a short survey.



Compare your current plan to our proposal and you decide which plan benefits you most.

*This is a hypothetical example, and your results will vary.