Are You Thinking About Investing in a Roth IRA?

Please join us for an informative event.

Roth IRAs have become popular retirement savings vehicles because if certain conditions are satisfied, distributions from Roth IRAs are completely free from federal income taxes. Is a Roth IRA right for you? The answer is a complicated one, and depends on your particular situation, including whether you believe you'll be in a higher tax bracket in the future.

In this seminar on Roth IRAs, you'll learn:

- The difference between Roth IRAs and traditional IRAs
- The conditions that make Roth IRA distributions free from federal income tax, and contribution rules for Roth IRAs
- Ways to convert a traditional IRA and/or employer retirement plan to a Roth IRA
- How to calculate the conversion tax

You'll also receive a free workbook created just for this presentation. The workbook contains key information, worksheets, and questions to help you remember important points from the seminar.

When & Where
Event Location:
123 Main Street or Zoom link
Wednesday, March 3, 2021
10:40 AM to 12:40 PM

R.S.V.P.
To reserve your spot, please contact me at:
Registered Rep Phone
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*A Roth IRA offers tax deferral on any earnings in the account. Qualified withdrawals of earnings from the account are tax-free. Withdrawals of earnings prior to age 59 ½ or prior to the account being opened for 5 years, whichever is later, may result in a 10% IRS penalty tax. Limitations and restrictions may apply.