

The Retirement Tax Trap



Do you understand the differences between taxable and non-taxable retirement alternatives? Understanding how these plans work aids one in finding their financial path to a controlled and predictable retirement future.

When you file your taxes for the previous year, it's reasonable to assume you will utilize a CPA or licensed tax preparer who understands the workings and ramifications of the tax code surrounding income taxes and deductibility. In other words, how to save you money as it pertains to deductions and determining how much you pay to the IRS. It makes sense that one would utilize this type of professional to save on taxes.

With that same rationale, wouldn't it be prudent to utilize a professional who understands the workings and ramifications of the **tax code surrounding retirement plans**?

What if it could mean thousands if not tens of thousands of dollars more for your retirement income and legacy to your heirs?

Our view is that every client should be aware of the tax structure surrounding retirement plans to ensure awareness of the retirement options, when comparing a Tax-Free Retirement vs. a Taxable Retirement.

Call my office today for a free analysis of your current retirement plan and see how taxes will affect your future savings.

Remember: You will make more money by reducing your taxes than you will by making more money.

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