1. **Do you know how to turn my Tax Deferred IRA into a TAX FREE Investment?**
2. **How do you keep up to date on IRA rules?**
	* **When did you last attend an IRA training course?**

**Ask to see course manuals.**

1. **What are some of the latest tax law changes?**
2. **What do you recommend I do with my lump sum distribution from my company's retirement plan?**
3. **How does the government force me to pay taxes on my IRA?**
4. **How do I properly set-up my IRA and Life Insurance beneficiaries?**
	* **How do I keep those up to date based on life changing events?**
	* **How do you keep track of my beneficiary forms?**
5. **What is my life expectancy?**
	* **What is my required IRA distribution if I inherit an IRA from my spouse?**
6. **What will happen to my IRA when I die?**
	* **How should an inherited IRA be titled?**
	* **What will be the tax consequences to my beneficiaries?**
7. **What tools can I use to integrate estate planning into my IRA?**
8. **How do I create income for life, keep the government out of my retirement account, avoid market losses, and leave a legacy for my beneficiaries?**

|  |
| --- |
| **If your Financial Advisor is concerned with your investments but not informed on current tax laws and how to turn something “Forever Taxed” into “Tax Free” …****No Obligation - Call today!**  **William Smith 704-907-9258**  |