Estate, Legacy and Long-Term Care Planning Informational-Only Group Discussion For Concerned Pre-Retirees, Retirees & Seniors

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Come learn about common planning strategies that can be used to help you fully "Disinherit the IRS" and maximize the assets that will pass to your chosen beneficiaries by eliminating the income and estate taxes that will be due when they inherit your Traditional IRA, 401K, etc.

The Estate, Legacy and Long-Term Care Planning Center of Western NY

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Wednesday, May 24th
1:00 pm - 2:30 pm

Perinton
Community Center

1350 Turk Hill Road, Room 204-C

FREE TO ATTEND

Click Here to Register

This is a complimentary and highly informative workshop

Solutions to the following planning concerns will be covered in detail:

- Learn how the recently passed changes to the “Stretch IRA” rules in the SECURE Act (the new “10-year rule”) will dramatically increase the income taxes that your IRA beneficiaries will have to pay when they inherit your IRA assets.
- Learn about the specific IRA planning strategies that are now recommended since the passage of the SECURE Act, which will fully negate these income taxes to your IRA beneficiaries, allowing you to completely “Disinherit the IRS” and maximize your financial legacy.
- Learn how your estate at your eventual passing can recover all of the income taxes that you paid during your lifetime on both your taxable IRA withdrawals and your Social Security income.
- Learn how traditional long-term care insurance and the new “hybrid” life insurance/long-term care combination plans can be effectively used to help protect your retirement assets and income from the high cost of long-term care.
- Learn how to make sure that you have all the necessary components of a solid estate plan, simplifying the administration of your estate and totally avoiding the cost and time delay of Probate.
- Learn about creative gifting strategies to children and grandchildren and much, much more.

Click Here to Register

or

Call 585-721-2385

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