TAX FREE IN RETIREMENT

presented by: MICHAEL ALIMO, ChFEBC

Wednesday, January 17, 2018
7:00 PM

Please join Michael Alimo, ChFEBC, Investment Advisor Representative in our Schine Meeting Room at 7:00 pm on Wednesday, January 17 to learn about strategies that can help you get closer to a tax free retirement.

Michael will answer for you:

- If taxes increase in the future, will my chances of outliving my money be reduced?
- Discover how you can safely build a tax favored position in retirement using methods that have been around for over 150 years.
- How to prevent my taxable IRA from growing and why?
- Should I take required minimum distributions early or later?
- Am I paying too much in taxes now, is there a way to reduce them?
- What is "The Tax Bridge" and when do I cross it?
- What tax free vehicles exist and are they appropriate for me?
- The tax bracket strategy, how diversified am I really?
- Are Roth IRA conversions right for me, how does this affect my taxes today?
- What is a 72T distribution and is it right for me?
- By losing my deductions in retirement how does that change my tax picture?
- How will retirement accounts impact my heirs?

Michael Alimo has worked for many Wall Street brokerage houses over his career and has been Alimo's veteran financial advisor for the last 15 years, devoted to serving clients around CT and New England at his USA Financial & Tax Services, LLC. In gratitude for many years of business and support from customers around the state, Michael remains committed to giving back to the community via informational presentations and educational workshops. He has hosted many seminars, speaking to groups about a broad array of financial, investment and retirement topics.

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Questions:
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