

Retirement Assets

Passing Retirement Assets to children may cost your children up to 65% tax.

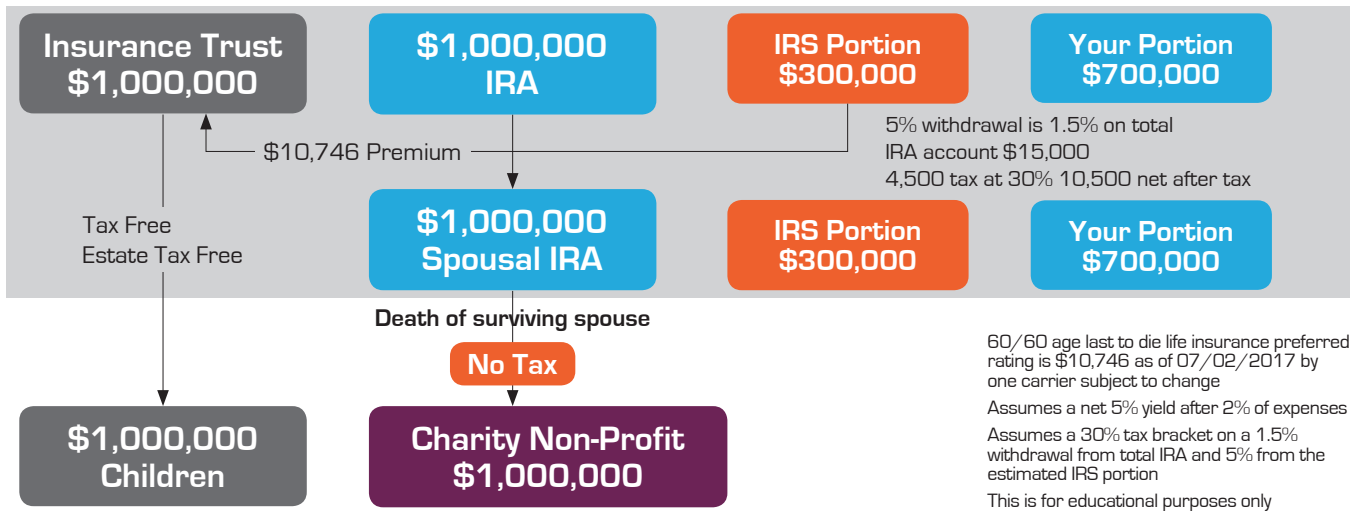
Deferring taxes in a retirement plans such as a 401K or IRA can be good. However, retirement plan assets are taxable as they are withdrawn.

Retirement Plan assets are normally passed to the surviving spouse then may be taxable up to 65% to the next generations.



The Retirement Plan/IRA owner designs an exit strategy which would provide income to the owner and surviving spouse and has the potential to maximize wealth to the children and charity.

Potentially Give 100% To Heirs And 100% To Charity Of IRA



Potentially Give 200% To Heirs And 100% To Charity Of IRA

