September 9, 2014
10 - 11:30 am
Panera Bread
5090 Tiedeman Rd.
Brooklyn, OH 44144
or
September 10, 2014
8:30 - 10 am
Signature Financial
6500 Busch Blvd. Ste. 105
Columbus, OH 43229

GUEST SPEAKER:
Eric Waller J.D. CLU, ChFC
2nd Vice President
Life and Annuity Division
Protective Life Insurance Company

HOSTED BY:
Signature Financial Brokerage

PLEASE RSVP TO:
Linda Thomas
877-735-5528 x111
lindat@sfbrokerage.com

RSVP before 9/5/14
to reserve your space

We look forward to seeing you there!

Protective.
Life Insurance Company
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Join us for a light breakfast while we learn about IRA Maximization.

You'll learn about wealth transfer strategies that allow your clients to transfer the value of an IRA into more cost effective tax effective arrangements.

Some of the most experienced advisors are not familiar with these strategies. You will learn how to capture more opportunities and help your client's loved ones benefit as much as possible.

Five IRA Maximization strategies.

1 **TAX OFFSET**
Helps beneficiaries alleviate the income tax owed

2 **TAX ELIMINATION**
For individuals with charitable interests who also want to leave assets to their heirs

3 **LEGACY ENHANCEMENT**
Enables individuals to enhance the amount their beneficiaries inherit

4 **MULTI-GENERATIONAL IRA**
For individuals who want to create a financial legacy that lasts generations

5 **SPOUSAL ROTH IRA CONVERSION**
A plan to provide the money needed to convert a traditional IRA to a Roth IRA while leaving a financial legacy for loved ones