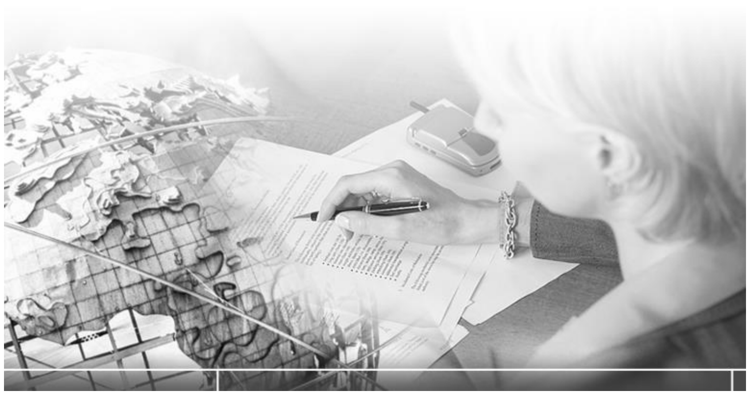
Is a Roth Conversion Right For You?

This is one of several workshops to provide the attendee with an understanding and application of the essential planning topics necessary to manage your financial life. This information will provide you with a comprehensive financial foundation, along with advanced planning strategies to help you plan for a successful financial future

Roth IRA Conversions



The following Roth IRA Conversions subjects will be covered:

- ✓ Introduction to Roth IRAs
- ✓ Traditional IRA vs. Roth IRA
- ✓ Roth Tax-Free Qualified Distributions
- ✓ Qualified Distributions
- ✓ Nonqualified Roth Distributions
- ✓ Ways to Fund a Roth IRA
- ✓ Converting a Traditional IRA to a Roth IRA
- ✓ Calculating the Conversion Taxes
- ✓ Converting Employer Plan Dollars to a Roth IRA
- ✓ What if a Conversion Doesn't Work Out?

Instructor: Michael J. Aluotto, CRPC®

Mr. Aluotto is President and Private Wealth Manager of Vertex Wealth Management and has managed clients' wealth for more than 35 years. He is a Chartered Retirement Planning Counselor® and an Investment Advisor Representative, and earned his Bachelor of Science degree from Cornell University.

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Reserve your seat:
585 Stewart Ave., Ste. L-16
Garden City, NY 11530
Call: 516-294-8200
mjaluotto@1stallied.com

VERTEX WEALTH MANAGEMENT, LLC