

Roger Green



Your Green Roger Green, MSFS, CFP Green Financial Resources

Your Green 2022: Investment Year-End Tax Planning

Roger Green, MSFS, CFP® | Green Financial Resources
29 December 2021

As we end one year and begin another, there are things you need to think about doing to maximize your retirement assets, gain any available tax benefit, and/or avoid any tax penalty that may be linked to your investments. Here are some things you should consider:

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Your Green 2021: Age 72 or older? Don't forget your RMDs!

Roger Green, MSFS, CFP® | Green Financial Resources
16 December 2021

What is an RMD? In the year in which you turn 72 (was age 70 1/2 before 2020), current IRS guidelines require you to take a **Required Minimum Distribution (RMD)**, from your Qualified retirement accounts (tax advantaged accounts).

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Your Green 2021: What Women Need to Know About Retirement

Roger Green, MSFS, CFP® | Green Financial Resources
01 March 2021

A report released in 2020 by the National Institute on Retirement Security (NIRS) finds that across all age groups women have substantially less income in retirement than men (National Institute on Retirement Security, NIRS 2020).

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Your Green 2021: Charitable Giving – Leaving a Legacy and Helping Others

Roger Green, MSFS, CFP® | Your Green | Green Financial Resources
03 January 2021

Are you at the point in your life where you are seeking alternative ways to provide funds or leave a portion of your estate to support a cause close to your heart?

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Make time to review your retirement plan
Get your plan on track
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- Financial and retirement planning
- Intergenerational planning
- Maximizing your existing 401k/403b/457b
- Harvesting Plan for your retirement assets
- Estate Planning/Trust Planning
- Long Term Care, Disability & Life Insurance
- IRA/Roth contributions
- Timing of Social Security
- Medicare
- And more!

Contact Green Financial at 770.931.1414 or via www.RogerGreen.com for a complimentary retirement plan health check.

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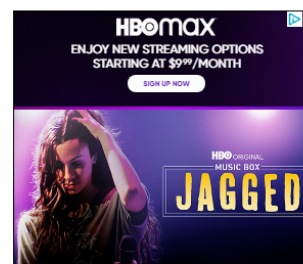
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What is an RMD? In the year in which you turn 72 (was age 70 ½ before 2020), current IRS guidelines require you to take a **Required Minimum Distribution (RMD)**, from your Qualified retirement accounts (tax advantaged accounts).

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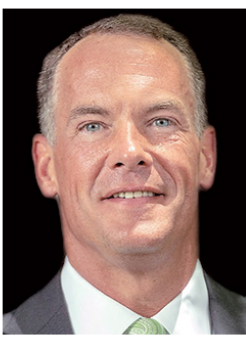
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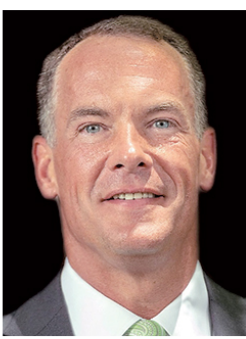


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22 December 2020

As we end one year and begin another, there are things you need to think about doing to maximize your retirement assets, gain any available tax benefit, and/or avoid any tax penalty that may be linked to your investments.

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- Your Green 2020: How Can I Afford College?
- Your Green 2020: A Harvesting Plan for Retirement Assets
- Your Green 2020 | Credit Score: Why Does it Matter?
- Your Green: Senior Fraud – Prevention and Action