



WELCOME TO *ONE-STOP* RETIREMENT PLANNING

Nest-Ed's Retirement Planning Course

Rollins College

1000 Holt Ave

Winter Park, FL 32789



Saturdays

Jan 26 & Feb 2

9:30 AM to 12:30 PM

Mondays

OR Jan 28 & Feb 4

6:30 PM to 9:30 PM

Register or more info at
www.Nest-Ed.com

Learn 13 tax mitigation strategies to keep more of what you earn, save and invest. This information has been freshly updated to explore 2018 tax reform's impact on you.

Other topics covered:

- ▶ How much to earn, save and have invested in order to be prepared for retirement
- ▶ Design what retirement looks like for you and how to successfully produce that
- ▶ Maximizing tax deductions now that the standard deduction has doubled
- ▶ Exploiting lower tax rates currently available by strategically making Roth conversions in order to have more of your retirement income tax-free
- ▶ How to handle a potential drop in the market as you transition into, or are in retirement
- ▶ Avoid triggering unnecessary and large tax burdens when passing assets to loved ones
- ▶ How to utilize the three different tax treatment types of accounts for decades of tax-efficient withdrawals from your retirement accounts
- ▶ Investment strategies for producing inflation protected retirement income to maintain your lifestyle
- ▶ Effectively and efficiently passing wealth to loved ones
- ▶ Protecting assets from being unjustly taken from litigation or catastrophic loss
- ▶ Maximizing charitable impact for both you and the causes that matter the most to you