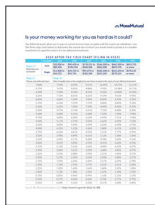


Tax Season

Which retirement assets are taxable?
Which aren't?

SHARE THESE RESOURCES WITH YOUR CLIENTS



Is your money working for you as hard as it could?

Tax-deferred assets allow you to pay no current income taxes on gains until the assets are withdrawn. Use this three-step chart to determine the annual rate of return you would need to produce in a taxable investment to equal the return of a tax-deferred investment.



Taxation of Lifetime Distributions from Nonqualified Annuities

A non-qualified deferred annuity can provide tax advantages for those saving for retirement.



Make the most of your retirement savings

Planning for retirement can be taxing; saving for it shouldn't be.



1040 At-a-Glance

Using your tax forms to identify financial planning opportunities.

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