AMERICAN FINANCIAL EDUCATION ALLIANCE

& MEGAN MUCCIO, CFF®, CPA

Present

Taxes in RETIREMENT

7 Steps to RETIREMENT READINESS

Taxes in Retirement

Wednesday, July 21 @ 12p or Wednesday, July 28 @ 7p

7 Steps to Retirement Readiness

Wednesday, July 21 @ 7p or Wednesday, July 28 @ 12p

Taxes In Retirement

- How and why the marginal tax system differs in your retirement years to your detriment
- Will you really take money out of your IRA at a lower tax bracket than you put it in?
- Understand the provisional income calculation on your Social Security payments
- Understand how Capital Gains and Dividends impact your overall tax liability differently in retirement
- How IRA Required Minimum Distributions work and affect your tax liability
- How Social Security is taxed
- When Medicare premiums can increase as a result of your income

7 Steps to Retirement Readiness

- 7 Key steps to improving your retirement
- Understanding why Financial Fundamentals are key to success
- How to be a Retirement Champion
- Understanding your Retirement Road Map
- Does Budgeting Matter in Retirement?
- Being on the same page with your spouse
- What is Financial Paralysis and Financial - Free Fall – how to avoid both
- Making sure you enjoy retirement
- Assessing your current situation
- Understanding 3 Major risks in Retirement most advisors do not discuss with you
- What is the risk of outliving my money?
- Understanding the 2 Forms of income in retirement and what is the proper mix to have.

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