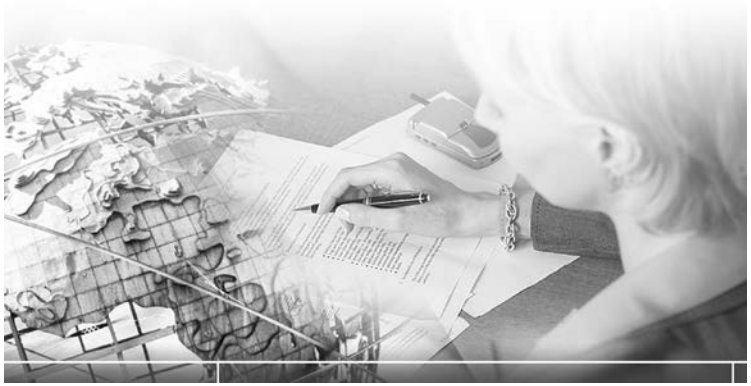
Is a Roth Conversion Right For You?

Opportunities for 2014

Date: December 4, 2013/ Time: 6:30 pm
Location: Mid-Island Y JCC
- **45 Manetto Hill Road**
- **Plainview, NY 11803**

Roth IRA Conversions

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



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?

Reserve your seat:
Call: 516-294-8200
or email:
mjaluotto@1stallied.com

Instructor: Michael J. Aluotto

About the Instructor: Mr. Aluotto is the President of Vertex Wealth Management, LLC and is an independent Private Wealth Manager with the broker dealer First Allied Securities, Inc.

VERTEX WEALTH MANAGEMENT, LLC