

“Taxes in Retirement” Presentation Talking Points

- My name is _____, and I am a [insert title and credentials]. It is my job to help people like you understand the options available to them in order to meet their retirement goals. Today, we’re going to talk about taxes in retirement.
- The majority of Americans are going to run out of money before they run out of life.
- We live longer than ever before, and in addition to overall costs going up, living longer often means expensive health care.
- Did you know that people were filmed rearranging deck chairs on the Titanic after it hit the iceberg? Compare your retirement savings to the Titanic. How many of you are rearranging the deck chairs, not knowing that you have already hit the iceberg?
- On October 31, 2019 our national debt hit \$23 trillion. The only way that the U.S. government can raise revenue is by raising taxes. Are you prepared?
- We are living in a historic high debt environment, but we are also historically in a very low tax environment. The government is going to have to raise taxes in the future. What does that mean for your retirement plans?
- If you’re a mountain climber, what is your ultimate goal? It isn’t just to make it to the top of the mountain. You want to make it back down safely again.
- The goal of this seminar is to clear up any confusion around taxes in retirement and make it simple.
- I want to help you see your retirement income blind spots and show you with clarity the opportunities available to optimize your income withdrawal strategy.
- Being aware of tax considerations for your retirement income plan and utilizing a tax-efficient income withdrawal strategy could keep thousands of dollars in your pockets instead of Uncle Sam’s.