Email Content for *Real* Wealth® Weekly

Tax strategies for Roth conversions

*with Jim Silbernagel*

For the week starting on the date 09.12.2022

\*\*The *Real* Wealth® message to Advisors is featured on our www.realwealthmarketing.com website. The *Real* Wealth® message to consumers is included on the Advisors’ pre-approved email templates. The Advisor “access, approach, and ask” and “in case you missed last week’s show” lines are emailed to the advisor on Monday morning.

***Real* Wealth® Message to Advisors:**

With new tax laws and regulations being put in place on a seemingly everyday basis, it can be difficult for your clients to keep up and utilize the many tax strategies that are available. This week, CEO and Financial Professional Jim Silbernagel discusses what tax strategies your clients should be aware of if they’re looking to convert to a Roth IRA.

Advisor Access: Clients still stuck on Roth’s? Share this previous podcast episode with them to help them understand their conversion options! https://realwealthmarketing.com/podcasts/is-a-roth-conversion-right-for-you

Advisor Approach: Your clients approaching retirement age should tune in to this week’s program to see if a Roth conversion is the right move for them!

Advisor Ask: “Roth conversions may seem confusing, but they may be the best move for your financial future, make sure you’re up to date by checking out this program and then let’s meet!”

***Real* Wealth® Message to Consumers:**

With Roth conversions potentially being eradicated in the next several years, it’s critical for you to do an analysis with your financial professional on whether a Roth is right for your situation. Join Financial Professional Jim Silbernagel as he discusses the tax strategies you can use to help you convert to a Roth IRA.

In case you missed last week’s show…

* Why knowing what tax bracket you’re in is critical to your financial future
* Why it’s important to do an analysis on Roth conversions, even if you don’t decide to convert
* What tax traps you should be aware of when it comes to IRMA and Social Security

Email subject line: Ready to convert?

Listen to the show <<link>>

Quote of the Week:



Sample BD disclosure:

(All Broker Dealer Sponsors have agreed-upon language.)

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