







ROTH CONVERSION STRATEGY

Gregory W. Lawrence CFP®, ChFEBCSM
Certified Financial Planner®

 21628 Berwhich Run
Estero, Florida 33928

 greg@lawrencelegacygroup.com
www.lawrencelegacygroup.com

 239-354-7934
407-379-5951

 Investment Advisor of Odiorne
Point Asset Management, LLC.

Schedule an Appointment:

For your convenience we do virtual appointments.
<https://calendly.com/roadmap-to-retirement>



Roth Conversion Strategy Advantages:

You pay none of the Federal taxes out of your pocket.



Investment is sheltered from market loss with competitive returns.



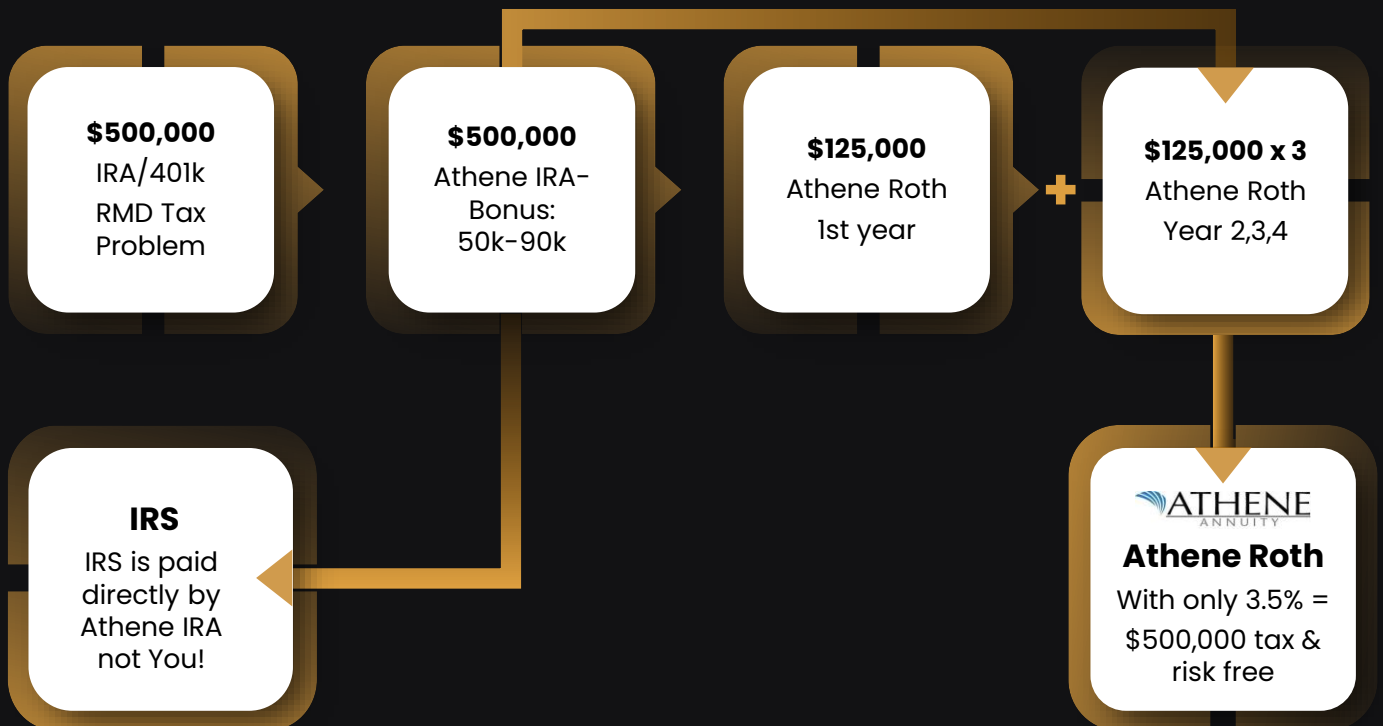
Your heirs receive assets 100% free of Federal Income taxes



Taxes are paid directly by Athene to the IRS.



Reduce your future RMDs and possibly lower your future tax bracket



An easy way to liberate your IRA from Taxation Forever!

Licensed Insurance Professional. Investing involves risk, including the possible loss of principal. Insurance Company products are backed by the financial strength and claims paying ability of the issuing company. We are not affiliated with any government agency.