Tax Bracket Planning Form

Are Income Taxes your Biggest Annual Expense?

How much are you paying Taxes and Capital Gains each year on interest and dividends generated from your investment portfolio?

How much have the increased Tax rates, the Affordable Care Act impacted your retirement plans?

Do you believe tax rates are going up or down in the future?

Would a Supplement Retirement Plan, where the Future Tax Rate is Irrelevant, be beneficial to your Investment Portfolio?

How much of your retirement income will be Non-Reportable [Income Tax Free]?

Will your retirement plan pass to your family on a tax favored basis?

Do you have the use of your money before age 59 ½ without any IRS penalty?

Is your current plan protected from creditors?

What method are you using to shift business assets to your personal Investment portfolio on a Tax Favored Basis?

Taxes are the biggest obstacles in reaching Financial Independence.
Reposition your existing money and future money from unnecessary taxes.

For more information on how to utilize Tax Bracket Planning and take advantage of strategies that address these items, simply email, fax or mail this form to us. Better yet, just give us a call.

______________________	______________________	______________
Name	Email	Phone Number

If you want something tomorrow, you have to do something today.

KFS KELM FINANCIAL SERVICES INC. Since 1987

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