

Tax-Smart Retirement Strategies

TAX-SMART RETIREMENT STRATEGIES

Atlas Financial Advisory Group

Key Strategies:

1. Roth Conversions

Convert traditional IRA to Roth in low-income years.

2. Tax-Loss Harvesting

Offset gains with strategic losses.

3. Qualified Charitable Distributions

Reduce RMD tax impact through giving.

4. Asset Location Optimization

Place tax-inefficient assets in tax-advantaged accounts.

Schedule your tax review: 941.966.0234