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J. VITUCCI FINANCIAL SERVICES LAUNCHES ROTH CONVERSION DECISION ASSIST PLATFORM

KENSINGTON, CA – (2/18/2010) – J. Vitucci Financial Services, Inc., an independent wealth management practice serving residents of the San Francisco Bay Area, has launched a platform to help clients in the decision-making process for Roth IRA Conversion given opportunities presented by new tax legislation currently in effect.

In making the announcement, Jason Vitucci, Managing Director of J. Vitucci Financial Services, said, “The opportunity to convert traditional retirement assets to the Roth registration in 2010 is something that should be examined by everyone. We have developed a proprietary process for helping individuals through this decision, and then taking the steps to manage the transition for them. Our practice is geared for this opportunity by combining a staff of seasoned tax advisors with independent financial advice, to provide the objective analysis needed to weigh this choice for clients. Everybody’s situation is unique, and the answer as to whether to convert is not a simple one. The unique ability to split the tax liability in 2010 led us to build a platform that could deliver clients an objective evaluation. This is something that people need help sorting through NOW, as these new tax laws have created a way to plan for retirement that is a departure from traditional tax-deferral.”

The Roth Conversion Decision Assist Platform combines analytical planning tools, with a qualitative discovery process, and income tax return projections to provide people with an objective view of whether it makes sense to convert, and which conversion strategy may be right. 2010 marks the first time that Roth IRA conversion is opened up to anyone, regardless of income. It can potentially be a great way to minimize taxation of a retirement asset, or create a tax-free inheritance for heirs. The Roth Conversion Decision Assist Platform not only takes into account the raw figures, but also the interplay between potential future tax rates, avoidance of required minimum distributions, and the money needed to pay the up-front tax bill that conversion creates. There are other intricacies which require monitoring after Roth conversion is made, which the platform also addresses.

The team at J. Vitucci Financial Services, Inc. brings over 30 years of combined financial services experience blending the expertise and know-how of industry leaders in tax planning, investment management, and retirement planning strategy. Mr. Vitucci, one of the firm’s principals, has been a guest on various radio programs, and currently curates a blog on personal finance and economics in California. He works with individuals and business owners on retirement transition planning, and client-centered investment strategies. Mr. Vitucci has worked closely with Susan Bass, an Enrolled Agent on staff, to develop the Roth Conversion Decision Assist Platform

J. Vitucci Financial Services is an independent wealth management practice providing financial planning, investment strategies, and tax advice to clients throughout the San Francisco Bay Area, employing a team of financial specialists who are dedicated to each client’s financial success. For more information, contact us at (510) 526-2220 or visit www.jvituccifinancialservices.com. Securities and Advisory Services offered through First Allied Securities, Inc. A Registered Broker/Dealer Member FINRA/SIPC

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