

# Wealth Management Strategies

Are You Sick & Tired of



The Wall Street Rollercoaster

Not Making Money with Your Retirement Savings?

Learn Why Some of the Wealthiest Families in America are Using These Types of Plans Now!

**Eliminate investment risk & still have potential for above average returns!  
Access your own money & then pay yourself back for major purchases!  
Potentially decrease or eliminate taxes on future income! (IRS Code 7702)**

**We can show a plan that has all these features:**

*TAX Free* Retirement Growth  
*TAX Free* Retirement Income  
*TAX Free* Inheritance for Heirs

**SAFE**  
**SECURE**  
**FLEXIBLE**

Eliminate All Market Risk  
Lock In All Gains Annually  
Access to Funds before 59 1/2

**Some of the Main Features:**

- There are NO ANNUAL CONTRIBUTION LIMITS – Like a Super funded Roth IRA
- This is a Perfect Vehicle for Business Owners & Their Key Employees
- Excellent Investment for College Planning – Income won't exclude children from student loans
- Reduce or Eliminate Taxes on Social Security Income (currently taxed up to 85%)
- Potentially Reduce (AGI) Adjusted Gross Income as well as (AMT) Alternative Minimum Taxes
- Increase Net Spendable Income – Less Tax means more money in your pocket
- At 70 ½ increase what you leave to your heirs by rolling over excess RMDs you don't need
- This Program Works Best With Minimum Insurance & Maximum Funding

**Conservative Growth Potential Without the Downside Risk!**

**Times are changing** and if you don't do something to change with it, you will be one of the millions of individuals who are retiring with a myriad of uncertainties. Even if you make a substantial income now, how are you going to navigate the risk in retirement? What vehicles are you going to use to bring home your wealth and make it last for you and families lifetime?

50 years ago you went to work for a company and stayed for 30 years. You retired with a gold watch and a monthly lifetime pension. Even basic pensions are going away now. Less than 15% of large corporations offer pension plans and those companies that do are being forced to reduce the benefits due to economic and bottom line concerns. With all the financial problems we are experiencing secure state & government pensions are being challenged and could be forced to make changes in the future.

Market volatility and economic uncertainty can devastate you if you are retired or close to retiring. We have seen 2 major downturns during the past decade that compare to the great depression. What if you have to access your money during one of these downturns. Would you know where to put your money or how to access it?

## Higher taxes in the future are almost a guarantee

The amount of debt the US is carrying will eventually need to be dealt with. Unless we achieve full employment soon, which is unlikely, they will have to raise taxes. Estate Taxes for the next couple years are safe, but what's going to happen in future? Retirement vehicles like the 401k, 403b and company pension plans are going by the wayside and volatility in the markets are increasing. Small businesses are getting hurt just as bad as big businesses, if not worse. You Need Alternatives and we believe we have one.

We will work to help you understand how to properly plan for your retirement years during these challenging economic times by eliminating investment risk while still protecting your family, estate and business (if you have one). We will show you how to do all this as well as teach you how to dramatically decrease or completely eliminate taxes on your future income.

The majority of plans like this are set up incorrectly. We utilize a proprietary strategy that shows you how to accomplish the above listed numerous goals all in one program. Let us learn more about your situation and see if we can create a plan for you.



Mark Turner

### ***Wealth Management Strategies***

Address : 135 S. State College, Ste 200 Brea, CA 92821

email: [wmstrategies@yahoo.com](mailto:wmstrategies@yahoo.com)

**Phone:** 714-912-4906      **Fax** 949-203-6419

**Webpage** [www.safegi.com](http://www.safegi.com)

**Disclaimer** – We only work with companies with Insurance companies with long term track records and strong financial strengths. These plans include all the benefits associated with IRS Code Section 7702. To achieve the desired results you must follow the rules for maximum contributions as well as the requirements for the minimum amount of life insurance. To create the desired result for Taxation you must set up the correct Trusts for individuals or business contracts for businesses. More complicated plans require Legal Council to review before putting in place. You need to have an insurable interest. You can't just by this as an investment. Some individuals with large estates need estate planning to insure their insurance benefits will be tax free to heirs. It is best to work with a financial advisor who specializes in these areas to set up these programs that will achieve the results you desire. Before converting existing IRA's have your financial professional help you so you understand the tax consequences. This program is not right for everyone and there are you must be in relatively good health. Not everyone will be accepted. We take great pride in performing a thorough review before we make any recommendations.