

Safe Money Retirement Solutions

What Exactly Is the 7702 Security Plus?

Internal Revenue Code 7702 & 72(e): Allows for Tax Free income when disbursed, Tax Deferred growth and Tax Free inheritance



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Watch a 23 minute video on this program at

www.octaxfreevideo.com

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The *7702 Security Plus* The Best Retirement Vehicle That Wall Street Doesn't Want You To Know About

*IRS Compliant

No Loss When Markets Crash
No Tax on Distributions
Plus More Sleep and Less Worry



You're Never Too Old or Too Young To Open
A *7702 Security Plus* Retirement Vehicle

Wealth Management Strategies

LIFE IS FULL OF RISK...
BUT YOUR RETIREMENT PLAN SHOULDN'T BE

*Compliant with IRS code 7702 & 72(e) for tax free distribution, growth and transfer to heirs

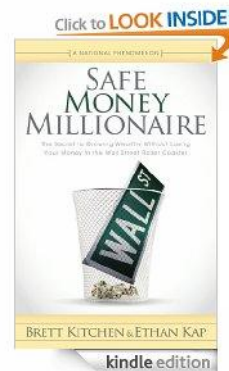
Table of Contents

Far Better Than a 401(k) or IRA
Created by Three Congressional Acts.....
IRS Compliant to Tax Code 7702 & 72(e)
Benefits of the <i>7702 Security Plus</i>
<i>7702 Security Plus</i> Funding Options.....
30 Year Crediting History
The Personal Bank of YOU
Why Haven't I Heard Of This Before.....
Understanding the Complete Story
Contact Us

The *7702 Security Plus* Retirement Vehicle is a “**Legally Binding Contractual Agreement**” with extremely conservative 100 + year old companies. These companies have survived 3 major wars, over 100 years of market meltdowns and have outlasted thousands of banks and other well know companies that have collapsed and closed their doors over the years.

If risk is **no longer an option** for your retirement dollars, then wouldn't you want your money with the institutions that have weathered the storms of the past 100+ years?

If so please continue reading.



If you're intrigued with what you've read so far, then please take the time to read *The Safe Money Millionaire*. I promise that **everything** will be explained in detail. You will be amazed.

Listen to the video at:

Pick up and read a copy!

www.octaxfreevideo.com

There is a better way!

Are you tired of your stomach doing flip flops every time you hear that Wall Street is in turmoil again? Ask yourself...how many more market crashes will you see in your life time? Are taxes going to go up? Does the thought of running out of money in retirement make you break out in a cold sweat?

The fact is ...the old “Buy, Hold and Pray” method of investing just doesn't work. **It never did and it never will.**

It's time to take control of your financial future and find out why Senators, Congressmen and the wealthy elite have used this program for over 25 years.

Don't let the excuse of...I'm just too busy...stand between you and a comfortable retirement. Invest just 3 hours for a life time of security. I promise you'll be glad you did. This program is a long term plan solution to help you and your family live a better life in retirement.

It's a great alternative to safe money such as CD's, Bonds and Treasuries. It's not a get rich quick scheme. It's designed for long term options for those who are tired of worrying about losing all they have worked so hard to attain.

It's simply the Best Retirement Vehicle that Wall Street Doesn't Want You to Know About

What are your dreams?

Why Haven't I Heard of This Before



On October 3rd, 2010 the Wall Street Journal reported: **“the top 10% of all income earners own more than half of the 7702 Security Plus type Retirement Vehicles in force today”**.

Its common knowledge that the top 10% income earners have access to the very sharpest CPAs, MBAs, Attorneys and Financial Experts that money can buy. The logical conclusion is that this retirement vehicle obviously meets and exceeds their high standards of safety and security while producing above average returns.

The author of Safe Money Millionaire, Brett Kitchen as well as The person sharing this information, Mark Turner, have helped hundreds of high income earners set up their 7702 Security Plus Retirement Vehicle over the past 20 years. Mr. Turner has decided it was time to spread the word about the “Best Retirement Vehicle That Wall Street Doesn't Want You to Know About”.

So why hasn't your Broker, CPA or Financial Advisor told you about this retirement vehicle?

1. It's important to remember that the financial strategies of the wealthy often take time to be recognized, understood and assimilated by the general public.
2. You advisor may have heard about it... but they don't get a *commission for life* like they do with “securities” and because of this their Broker Dealer generally won't allow them to offer it.

If your advisor tries to tell you it's a *“bad investment”*, remember they may have a hidden agenda (their income); they don't want to admit that it's a great program or won't admit they don't understand it.

Far Better than a 401(k) / IRA



Time Magazine: “The ugly truth, though, is that the 401(k) is a lousy idea, a financial flop, a rotten repository for our retirement reserve.”

(Source: Time Magazine, Oct. 2009, by Stephen Gandel, Time Magazine staff writer)

Three Reasons Your 401(k)/IRA Will Always Under Perform

Hidden Fees

In a CBS 60 Minutes interview with U.S. House Representative George Miller of CA, Chairman of Education and Labor, “The 401(k) program is riddled with up to a dozen hidden and undisclosed fees that in some cases eat up as much as 50% of the income, in some 401(k) programs over a 30 year span.”

(Source: Representative George Miller CA, interview with CBS 60 Minutes; 401(k) Fallout, April 2009)

Market Crashes

The dark side of the 401(k), IRA and qualified plans were exposed by the bear markets of 2000–2003 and 2008 when Wall Street crashed and people just like you lost hundreds of millions of dollars. (Source: CBS Morning Joe Interview with Time Magazine Editor)

The Inevitable Increase of Taxes

CBS 60 Minutes interviews David Walker, former Chief Auditor for the Congressional Budget office, candidly discussing the inevitable...increasing Federal taxes and shrinking entitlements to programs like Medicare, Prescription Drugs and Social Security.

(Interview with David Walker & CBS 60 Minutes “Wake Up Call” in 2010)

Created By Three Congressional Acts



In the mid 1980s the U.S. Congress passed 3 specific Acts that provide the legal ground work for today's *7702 Security Plus* Retirement Vehicle. These 3 Acts allow this program to provide tax fee benefits under the IRS tax code 7702 & 72(e).

- **TERFA 1982**
- **DEFRA 1984**
- **TAMARA 1988**

Because of the initial complexity of these 3 Acts, (before we had computers), it took a team of Attorneys and CPAs to construct this program and stay within the legal guidelines. Our sophisticated software programs now allow us to offer this to the general public without needing a team of high priced CPAs and Attorneys.

The 7702 Personal Bank of "YOU"



Want to buy a car or start a business? With the *7702 Security Plus* Retirement Vehicle you can just "borrow your own money." There's no need to qualify for a loan. Does this sound like the stuff that dreams are made of? Here are several people whose dreams came true using their own "personal bank"....do you recognize them?

James Cash Penny: Borrowed money from his 7702 type Plan and bailed out his 1400 stores (*J.C. Penny*) in the middle of the 1930's depression.

Roy Kroc: In order to build his *McDonalds Empire*, Roy took a cash loan from his 7702 type Plan to help fund his fledgling company and to finance his enduring advertising campaign.

Walt Disney: After being turned down by two finance companies, Walt borrowed against his 7702 Plan and sold everything to finance his ultimate dream. The rest is history

Doris Christopher: In 1980 Doris took a \$3,000 dollar loan against her 7702 type Plan and started the Pampered Chef in the basement of her Chicago home. In 2002 Warren Buffett's Berkshire Hathaway corporation bought her 700 million dollar company.

Start a business, expand your business, finance college or buy a car all by using your own funds. Pay YOURSELF the interest instead of the bank, all while building your *7702 Security Plus* even larger. No need to qualify...it's your own money.

IRS Compliant With Tax Code 7702 & 72(e)

An IRS tax-code based **7702 Security Plus Retirement Vehicle** under Internal Revenue Code 7702 is a TAX FREE alternative to traditional qualified plans such as a 401(k), 403(b), SEP IRA, ROTH IRA, Keogh that are **FULLY taxable on distribution**. Qualified plans have limits on how much an individual can contribute, penalties for pre 59 ½ distributions, taxable mandatory distributions after 70 ½, do not lock in earned gains, are subject to market volatility if invested in mutual funds and can have the amount of tax you have to pay changed by Congress at any time. And when you die, Uncle Sam will take his portion before it is passed onto your heirs.

IMPORTANT NOTICE: The term **7702 Security Plus Retirement Vehicle** is a pseudonym utilized exclusively by our firm to describe a specific type of financial planning structure that is available from over 15 corporations under various names. If you ask a financial salesman or broker about the **7702 Security Plus Retirement Vehicle**, you will be received by a blank stare.

Benefits of the *7702 Security Plus*

Tax Free Income at Any Age

- A Contractual Guarantee - No Loss When Markets Crash
- Gains Are Locked In Annually
- Tax Deferred Growth
- Tax Free To Heirs
- No Pre 59 ½ Withdrawal Penalty
- Does Not Count Against Social Security As Income
- Can Be Used As Collateral for a Loan
- Can Act as Tax Free Supplemental Disability Income
- Long Term Care Benefits
- More Flexibility Than a 529 College Savings Plan
- Does Not Count As Income For College Financial Aid
- Value Increases at Death

We challenge you to show us any other program that has as many benefits with a **Contractual Guarantee** to never lose a penny when the markets crash.

7702 Security Plus Funding Options



Never lose a penny when the market crashes (0% floor) and earn up to 13% (cap) when the market rises.

Funding for your 7702 Security Plus can be achieved in several different ways.

- Redirecting the savings you've been putting into your 401(k)/IRA
- Transferring your Savings, CD or Money Market
- Gradually Converting your "Carry Over" qualified plan from a previous employer (IRA, 401(k), 401 b etc.)
- Receipt of an Inheritance or Settlement
- Convert a portion of your 401(k), IRA or any Qualified Plan over a specific time period*

We can show you how you can even *loan yourself the money* from your 7702 Security Plus to pay the taxes when you convert your qualified plan.

On top of that you can even *earn interest on the money you loan yourself to pay the taxes.* How's that for amazing?

*Converting will cause a taxable event. You should understand the all the costs before converting..

Up Side Potential With No Down Side Risk



	<u>S&P</u>	<u>7702</u>
12/17/81	-7.43%	0.00%
12/16/82	9.98%	9.89%
12/15/83	19.48%	13.00%
12/20/84	2.92%	2.92%
12/19/85	26.23%	13.00%
12/16/86	17.50%	13.00%
12/17/87	-1.54%	0.00%
12/15/88	12.88%	12.88%
12/14/89	27.95%	13.00%
12/20/90	-5.93%	0.00%
12/19/91	15.87%	13.00%
12/17/92	13.83%	13.00%
12/16/93	6.41%	6.41%
12/15/94	-1.73%	0.00%
12/14/95	35.49%	13.00%
12/19/96	20.88%	13.00%
12/18/97	28.10%	13.00%
12/17/98	23.52%	13.00%
12/16/99	20.24%	13.00%
12/14/00	-5.49%	0.00%
12/20/01	-14.99%	0.00%
12/19/02	-23.43%	0.00%
12/18/03	23.18%	13.00%
12/16/04	10.47%	10.47%
12/15/05	5.63%	5.63%
12/14/06	12.16%	12.16%
12/20/07	2.43%	2.43%
12/18/08	-39.37%	0.00%
12/17/09	23.81%	13.00%
12/16/10	13.39%	13.00%
Compounded Average	7.73%	7.81%



13% Cap



0% Floor

