

TAX-FREE INVESTING

It's Not What You Make, It's What You Keep

Tax-free Investing: It's Not What You Make, It's What You Keep is a 40-minute educational program designed to inform individuals of the benefits and considerations of choosing investments that offer tax advantages.

OUTLINE

Welcome/Key Steps to Financial Success

Overview of Tax-advantaged Investing

- Tax-exempt/Tax-free
- Form 1040
- Reducing Taxable Income
- Tax Freedom Day
- Taxable vs. Tax-free Comparison

3 Ways to Own Muni Bonds

- Individual Bonds
- Unit Investment Trusts (UITs)
- Mutual Funds

Other Tax-advantaged Options

- Traditional and Roth IRA
- Traditional and Roth 401(k) and 403(b)
- Tax-free Money Market Fund

Portfolio Protection Strategy

- Life Insurance

Quick Reference Guides

- Benefits
- Risks

Summary/Next Steps

Q&A/Thank You

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