

Einstein didn't **understand** taxes.

Too bad he didn't have
this Tax ToolKit.



MMSD compiled this toolkit
filled with useful sales and
educational collateral.

Use it in your discussions with clients for topics
like retirement solutions involving annuities and
their tax implications. Meaningful discussions with
your clients about taxes is important throughout
the year, not just during tax season.

Contact Us

Let's work together.



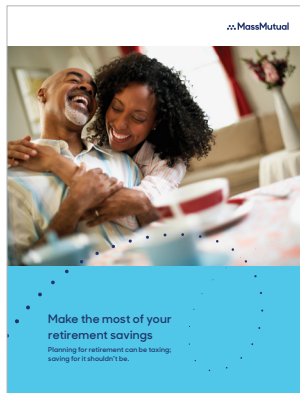
Call 1-855-464-3436



Wholesaler Map

TAX PLANNING/FILING

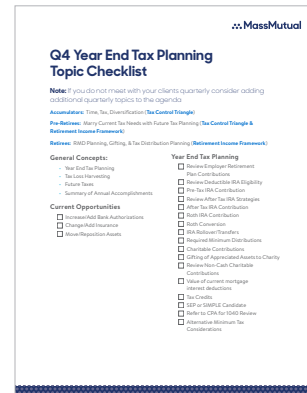
Help your clients understand how taxes may affect their savings. These pieces are designed to help you walk through planning and filing with your clients and ensure that they feel good about their tax situation.



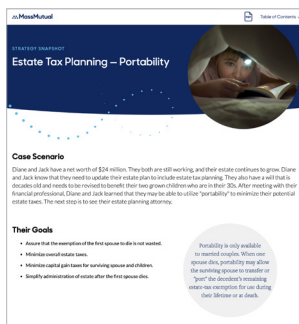
AN6231 Make the most of your retirement savings



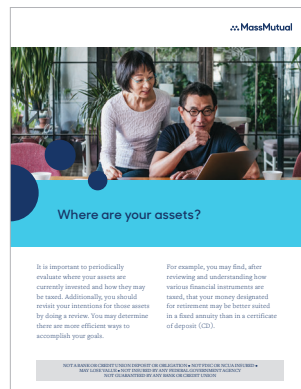
AN7566 Your 1040 At-a-Glance



FP1105a Q4 Year End Tax Planning Topic Checklist



AS8128e Estate Tax Planning – Portability



AN7551 Where are your assets?

TAX DEFERRAL

Some clients may be able to delay taxation to a more advantageous time.
These documents can help explain the benefits and usage of tax-deferred products.

Is your money working for you as hard as it could?

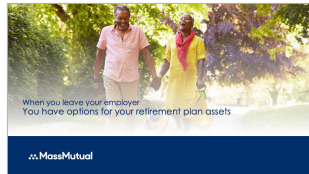
Two deferred assets allow you to pay no current income taxes on gains until the assets are withdrawn. Use the three steps that follow to determine the annual rate of return you would need to produce in a taxable investment to equal the return of a tax-deferred investment.

2022 AFTER-TAX YIELD CHART (YIELD IN 2022)

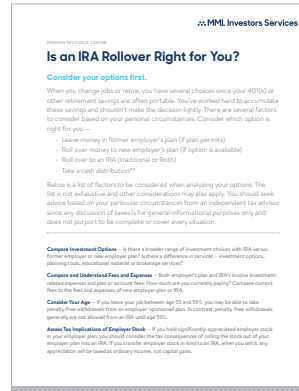
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ROLLOVERS/EXCHANGES

Transferring assets, such as an IRA to an annuity, might be a good choice for clients looking for lifetime income.



AN6201 Rollover Seminar



PRC12 Is an IRA Rollover Right for You?

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