



Tax-Advantaged Insurance Products & Strategies

Most Retirement Plans offered today are employer-based and Tax Qualified. The advantage of these plans is the contributions can be made pre-tax and the earnings are tax-deferred. It is important to understand that tax deferral not only defers the tax but also the tax calculation. This can potentially increase tax liabilities if, as many people believe, taxes go up in the future. Through the magic of **Max Funded Indexed Universal Life Insurance**, you can show your clients how they can grow retirement savings tax-deferred and access their cash value to help fund their retirement expenses income tax-free. PFG's Tax Free Retirement system coordinates all the tools you need with what we believe to be the best industry presentation software on this concept **"The Last Great Tax Saver."**



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