

Virtual “Lunch with a Legend” Meeting

Hosted by NAIFA Chicagoland

11/19/2020 1 PM Central



John W. Wheeler, Jr. CFP[®], CLU, ChFC, CRPC[®], LACP, LUTCF, CLTC
Presents:

*“What do Retiree’s Really Pay in Taxes and
How are Women and Married Couples
Adversely Affected by Current Law?”*

How does annuitization of 401k balances as well as other wealth cause taxes to go up 1% on some people?

How does the “Motherhood Penalty” reduce women’s Social Security benefits by 16% with the first child, and 2% for each one thereafter? How can you help boost women’s retirement savings?

The Urgency for Knowledgeable, Professional Advice Has Never Been More Essential!
This has been a historic year of change and volatility, and your clients and prospects need your help more than ever to maximize every tax-saving strategy possible. Learn how to make the most of the days we have left before we turn the page for a new year!

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