

"WE WILL PROVIDE VALUED SERVICES, PRODUCTS AND SOLUTIONS TO OUR CLIENTS – ALWAYS!"



L to R: Peter Hosker, Frank Storniolo, Mary Crook, Kathy Hamilton, Joel Olbricht, & Landon Olbricht

401k-onfusion

As we conduct taxpayer's tax return reviews, we continue to witness three things about IRA accounts:

1

Get on top of your old 401k accounts and IRAs

There is no better time than right now to get on top of your old 401k accounts and IRAs. While the markets may be in a period of contraction, your old 401ks and IRAs are ultimately in your control. Rolling over your old 401ks and IRAs into one IRA rollover will allow you to retain flexibility, control, and simplify your life.

2

Remember to diversify your investments with professional investment firms

Remember to diversify your investments with professional investment firms. Consider using investment advisors that charge fees based on managing your funds. Use professionals to review all your assets in every account so that all investments are coordinated and diversified. Stay on top of your investments and stay positive!

3

Roth Conversions

There are big reasons to consider converting your IRA accounts to Roth accounts. Future IRA growth in a Roth is tax-free. If your values are as low as everyone else's, you will pay less tax to convert your IRA to a Roth AND save CONSIDERABLE tax in the future as the account grows.

We welcome your feedback, questions and inquiries about our services. You can reach us at info@olbrichtstorniologroup.com or visit our website at www.olbrichtstorniologroup.com. We look forward to hearing from you!

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