



CONCIERGE

Coordinated Asset Protection and Growth Strategies

“Super Roth”

the Roth Emulator by CONCIERGE

A unique strategy offering an array of benefits and tax advantages similar to those found in a Roth IRA.

High earners enjoy unmatched levels of flexibility with no restrictions on income or contribution levels.

Uses:

Retirement

College / Education

Business Ventures

Large Purchases

Emergency Needs

Illness / Long Term Care

Benefits:

Tax Deferred Cash Growth ¹

Tax Free Distributions ¹

Downside Investment Protection

No Reportable Income ¹

Liquidity

Flexibility

Death Benefit

Long Term Care Benefit ²

1 - Tax advantages assume a non-modified endowment contract remains in force and current tax rules apply.

2 - Options must be selected at time of purchase

The “Super Roth” Roth Emulator concept provides tax advantages similar to those found in a Roth IRA. This concept is not a qualified retirement program and it is not associated with a Roth IRA or any other government IRA program.

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This information contains references to concepts that have significant legal, accounting and tax implications. It is not intended as legal, investment advisory, accounting or tax advice. Clients should consult with their own tax advisor or legal counsel regarding the application of these concepts to any particular situation.