

# Roth IRA Conversion—

## marketing opportunity for Trust and Wealth Management Groups

The new rules allowing higher-income people to convert their IRAs and other retirement plan assets to a Roth IRA offer an opportunity for trust and wealth management professionals to gain new investment management business.

Experts agree that wealthy people who don't expect to need their retirement assets to live on are the biggest beneficiaries of the new rules.

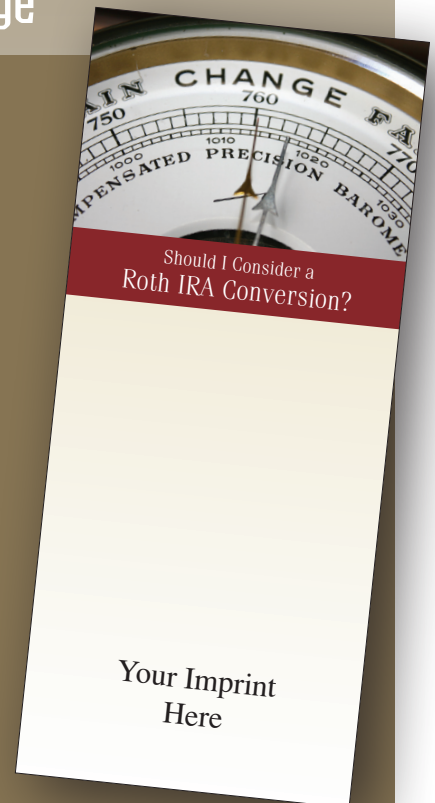
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## 2010 Roth IRA Marketing Package

- **Should I Consider a Roth IRA Conversion?**  
8-page booklet explains in detail the pros and cons of converting to a Roth IRA. Ideal for: hand-out at meetings and seminars, rack distribution, statement enclosures and direct mail campaigns.
- **Bankers' Facts Sheet**  
Great for explaining the new rules to bankers
- **POS Poster**  
Let customers know that you can help them with their Roth IRA conversion.
- **Counter-top Display Rack**  
Plexiglas display with promotional insert and pocket for brochures.



### Advantages of a Roth IRA:

- Eliminate minimum distribution rules.
- Boost the value of the assets that you leave to your beneficiaries.
- Tax-free Roth IRA distributions don't increase the amount of tax due on Social Security benefits.
- Take advantage of low income tax rates.

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