



Ideal Retirement Asset: Safety – Growth – Tax Enhancement – Liquidity

Which of the following Six Common Investments Qualify as an Ideal Retirement Asset?

<i>FEATURES</i>	<i>Indexed Annuity</i>	<i>CD</i>	<i>Money Market</i>	<i>Commodity Gold</i>	<i>Corp. Bond</i>	<i>Stock Fund</i>
1. Is the Asset free from Market Risk?	Y	Y	Y			
2. Does a <u>Bonus</u> Kick-Start Asset Growth?	Y					
3. Are the Asset Earnings Tax Deferred?	Y					
4. Earnings “Locked In” & Guaranteed?	Y	Y	Y		Y	
5. Potential Soc. Security Tax Advantage?	Y					
6. Get Money Out <u>without</u> Sale or Penalty?	Y					
7. Is Asset Value <u>not reduced</u> by comms?	Y	Y	Y			
8. Avoids costs and delays of Probate?	Y					
9. Guaranteed Lifetime Income Options?	Y					
TOTALS	9	3	3	0	1	0

If you have an asset that contains all 9 of these powerful elements then you have the makings of an Ideal Retirement Asset.