

PRIORITIES FOR GROWING WEALTH



FREE

- > 401(k) company matched pensions

TAX FREE

- > Roth IRAs
- > municiple bonds

TAX DEFERRED

- > annuities
- > IRAs / 401(k)
- > permanant life insurance

TAXABLE

- > income
- > real estate
- > stocks
- > mutual funds

Disclaimer: This chart is for illustration and general purposes only and not intended to be used for any specific individual. Each of your financial vehicles may vary in State or Federal tax treatment. Tax treatment may also vary by how individual investment vehicles are structured and managed. Please consult with your tax professional regarding tax liability of your individual financial situation.