Upcoming Seminar Explores Key Tax Planning Strategies for Each Stage of Retirement

PITTSBURGH, PA, UNITED STATES, January 10, 2025 /EINPresswire.com/ -- An educational dinner seminar titled “How Tax Planning Changes Through Four Stages of Retirement” will take place at 6:30 PM ET on Tuesday, January 21, 2025, and Thursday, January 23, 2025, at Ruth’s Chris Steakhouse in Downtown Pittsburgh.

Franklin Madison Private Wealth

At this tax planning seminar, attendees will learn actionable insights on retirement tax planning, including:

- The critical tax question you must answer before retirement.
- Surprising expenses that often make retirement more costly.
- How to avoid the “Social Security tax trap.”
- Why withdrawing assets in the wrong order can trigger higher Medicare premiums.
- How to manage taxes strategically even before you retire.
- The four stages of retirement and critical tax actions in each stage.
- IRA challenges and rollover considerations.
- Estate planning essentials to minimize tax burdens.
- Common mistakes to avoid in investment portfolios, health care, and estate planning.

> “Many retirees overlook the impact of poor tax planning, seeing it as a yearly task of filing and guessing outcomes. In retirement, small decisions can mean significant savings or unexpected costs.”
>
> *Peter Donisanu*

What Makes Retirement Tax Planning Unique?

Many retirees don’t realize the financial impact of poor tax planning. For most, tax preparation is a once-a-year exercise—collecting paperwork, preparing a return, and hoping for the best. However, retirement tax planning demands a different approach, as small decisions can lead to significant savings or unexpected expenses.

In retirement, your tax rate can fluctuate dramatically depending on how and when you draw from various income sources. Without a solid strategy, retirees risk paying more in taxes than necessary. This dinner seminar is designed to help attendees understand these challenges and create a plan to optimize their after-tax retirement savings.

The retirement phase is often more complex than the pre-retirement saving phase, yet tax planning is frequently overlooked. Understanding your "after-tax" retirement savings picture is essential to avoiding costly mistakes and create a sustainable financial strategy.

Why Attend?

This tax planning seminar offers expert insights, a comprehensive overview of retirement tax strategies, and practical steps for reducing your tax burden. Led by Peter Donisanu, a seasoned Pittsburgh wealth advisor, this seminar is designed to empower attendees with the knowledge they need to navigate retirement confidently.

Seating is limited, and reservations are required.

Reserve your spot today by visiting https://www.yoursvp.com or calling (833) 335-0856 and providing reservation code YAGJAQ.

About Franklin Madison Private Wealth

Franklin Madison Private Wealth specializes in simplifying complex finances for accomplished professionals so they can achieve financial independence with clarity, confidence, and peace of mind . With over two decades of experience, their Premier Wealth Blueprint offers a comprehensive approach to financial planning and investment management, ensuring clients are prepared for every stage of retirement.

Disclaimers & Notices

Understood. Below is a revised version that retains all elements from the original disclosure while incorporating a clear alignment with the seminar's focus on tax planning. This ensures consistency with the event's purpose while maintaining the integrity of the original content:

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The views expressed during this presentation are subject to change. Tax strategies discussed are general in nature, and the applicability of such strategies depends on individual circumstances. Attendees are encouraged to consult their tax professional for personalized advice. This seminar does not address every potential tax consideration and should not replace professional guidance.

Franklin Madison Advisors does not provide legal, tax, or accounting advice. Please consult your legal advisor and accountant before making any financial decisions.

Investing involves risk, including the possible loss of principal. No investment program is risk-free, and a systematic investing and savings plan does not ensure a profit or protect against a loss in declining markets. Any investment plan should be subject to periodic review for changes in your individual circumstances, including changes in market conditions and your financial ability to continue purchases.

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