
WHO IS ADDING TAX DEFERRAL TO THEIR PORTFOLIO?



ANTHONY T. NEWMAN,
PRESIDENT & CEO
LIFEGUARD FINANCIAL

1. Those looking for a safe way to reduce current taxes.
2. Those looking for the safest way to accumulate the most money with tax advantages.
3. Those who realize that Social Security, their IRA and pension benefits probably will not be enough for the future.
4. Those concerned with inflation. (Greater accumulation will mean more money for retirement).
5. Those who want their investment dollars to avoid probate.
6. Those who want to get their dollars to work harder and smarter without market risk.
7. Those who want a better return than bank CD's and IRA's.

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