



STRATEGIQ[®]
FINANCIAL GROUP, LLC

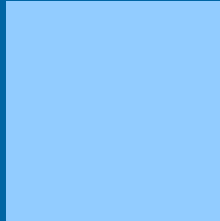
Income Tax Strategies for Tax Diversification

TAX
QUALIFIED
TAX
DEFERRED



100%
TAXABLE
PRINCIPAL
WHILE LIVING
OR AT DEATH

NON
QUALIFIED
TAX
DEFERRED



EARNINGS
TAXABLE WHILE
LIVING OR AT
DEATH

TAX
EXEMPT



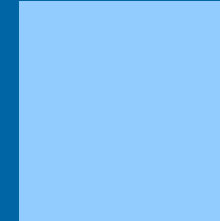
DISTRIBUTIONS ARE
TAX FREE

TAXABLE



EARNINGS TAXED
AT NORMAL
INCOME TAX RATES
OR CAPITAL GAIN
RATES

TAX
SHELTERS



TAX DEDUCTIONS
TAX CREDITS

TRUSTS



RETAIN GROWTH
INSIDE TRUST.
DISTRIBUTE INCOME
FROM THE TRUST IN A
TAX FAVORED WAY.

Examples

401K, SEP,
PROFIT SHARING,
MONEY
PURCHASE PLAN,
IRA, TSA PLAN

ANNUITIES,
LIFE INSURANCE,
U.S. SAVINGS
BONDS

MUNICIPAL BONDS,
LIFE INSURANCE
(IF PROPERLY DONE),
"ROTH" IRA

DIVIDENDS OR
GAINS FROM
SECURITIES

REAL ESTATE,
FOUNDATIONS,
CHARITABLE
TRUSTS,
NON-QUALIFIED
DEFERRED "COMP"

IRREVOCABLE,
CHARITABLE,
MODIFIED ILIT,
SPECIAL NEEDS