



HELPING YOU GET MONEY OUT OF YOUR IRA

Armed with focused knowledge, tools and programs, David Richmond, MSFS, CLU®, ChFC® and Matthew Curfman, CFP®, of Richmond Brothers Financial Management Specialists, Inc. are members of an Elite IRA Advisor Group training with Ed Slott – the man heralded by The Wall Street Journal as “The Best” source for Individual Retirement Account (IRA) advice. As a practicing CPA, Slott is the author of several industry-leading books on retirement distribution planning.

“I speak to more than 50,000 financial advisors a year,” commented Slott. “Since IRAs were first established, the only thing most advisors and investors

have worried about is how to get money into them. Now, with baby boomers entering their retirement years and once-secure pensions disappearing, investors will have to change their focus. The real issue now is how to get money out of their IRAs correctly without losing an undue amount to taxes or penalties. There are very few advisors that even know what to look for. The Master Elite IRA Advisor Group members not only know what to look for, they know what to do.”

Richmond and Curfman have consistently met the educational requirements and made a commitment to continue their Master Elite IRA Advisor Group™ training with Ed Slott and Company for the last four years.

This training involves multiple live sessions as well as ongoing instruction throughout the year from Slott and his team of IRA experts. Richmond and Curfman have dedicated themselves to a large and complex financial problem facing the country — effectively managing the distribution of assets from IRAs.

If you would like to discuss your situation further, or for guidance with getting money out of your IRA, contact Richmond Brothers Financial Management Specialists, Inc.

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Neither Sammons Securities Company, nor its Registered Representatives give tax or legal advice. You should consult with and rely upon your own tax or legal advisors before making an investment decision.

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Helping You Retire Right!
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