



## 3 REASONS THAT NOW MIGHT BE A GREAT TIME TO CONVERT YOUR IRA TO A ROTH IRA



### FUTURE TAXATION

The CARES Act was a stimulus that provided trillions. While no one can predict the future, it certainly seems possible that future taxes might be used to help cover that cost

### THE SECURE ACT MAY HAVE SECURED HIGHER TAXES FOR YOUR ACCOUNT

The SECURE Act drastically changed the rules for non-spousal IRA inheritance. If you haven't looked at how the new "Stretch IRA" rules will impact your family and loved ones, you may want more information on this.



### THE MARKET EXPERIENCED A DOWNTURN DUE TO COVID-19

Your IRA account may have lost some value due to the market correction. Although this is not a good thing, it could potentially save you taxes by converting a lower account value now and having potential future growth in an income tax-free environment.

[Contact Us Today!](#)

CONTACT US TODAY TO SEE IF A ROTH CONVERSION  
IS RIGHT FOR YOU:

**541.773.9567** or [JonesFinancialTalk.com](http://JonesFinancialTalk.com)

---



*Copyright © 2021 Jones & Associates Premier  
Financial Solutions, All rights reserved.*

We believe no two investors are alike. In order to help each client meet their financial goals, we take a personalized approach to investing. Our advice and recommendations are tailored to our clients' investment goals, desired return objectives, risk tolerance, time horizon, and income needs.

**Our mailing address is:**

2436 West Main St. Medford, OR 97501

Want to change how you receive these emails?

[Click here to unsubscribe and manage your email subscriptions.](#)

Fee-based financial planning and investment advisory services are offered by Jones & Associates Premier Financial Solutions, a SEC Registered Investment Advisor. Insurance products and services are offered through Jones & Associates Premier Insurance Solutions. The aforementioned affiliated companies do not offer tax-planning services or legal advice, but they do have unaffiliated strategic alliances to provide these services. They are not affiliated with or endorsed by the Social Security Administration or any government agency.