

STRATEGIC WEALTH STRATEGIES

# NEWSLETTER

[strategicwealthstrategies.com](http://strategicwealthstrategies.com)

## ARE YOU AWARE OF THIS CONCERNING YOUR RETIREMENT

Hi, my name is Alan Poter. I am a Certified Financial Fiduciary and the owner of Strategic Wealth Strategies. Thanks for joining me, in the next few of minutes. I'm going to share an exciting opportunity to build wealth that's tax free, does not affect the taxation of Social Security or the Means testing for Medicare Pt B which will be in the thousands of Social

Security or the Means testing for Medicare Pt B which will be in the thousands of dollars per year and most importantly, protect your wealth without worrying about what the stock market is doing. I have a team of people, top CPAs, and Tax Specific Attorneys and other specialists in their fields that I collaborate with to find solutions for people's financial planning. We collaborate with people who are in their prime working years, those that are quickly approaching retirement or even those that have already retired and we would love to meet with you. My team and I will show you how to save your retirement assets from complete tax devastation, as well as the exorbitant fees that are charged for managing your assets and eliminating or mitigating the risk in retirement. Knowing this information will help you protect your assets from 2024 and beyond.



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Most of our clients come to us thinking that a 401 K or their IRA is a little bit suspect, or they worry that they are not going to have enough income to last through retirement. These are all very common concerns in America. Like most Americans, you have been spoon fed the same tired advice to maximize your pretax wealth and retirement accounts. Contribute now during your working years but do not pay the tax. Wait until you retire because when you retire and you are making less, and you will be in a lower tax bracket.

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## DOESN'T THAT SOUND FAMILIAR?

It is the same advice we have been hearing since the 401k took the nation by storm in 1981. I have news for you, in the fall of 2022 there was a report put out by the Congressional Budget Office on a 31 Trillion dollar deficit, if we do not raise taxes overall by 66% by the year 2030 we can't even pay the interest on the debt and the country will go Bankrupt. Well, the debt is over \$34 Trillion and growing constantly. Did you know that the 401k was really put into place by accident? It was designed as an additional corporate tax dodge for highly compensated executives on top of their already well-defined benefits like their pension plan, and others.

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## WHY IS THIS AN ISSUE?

There were no studies to see if this would really work over multiple decades. No testing to see how would tax policy really works once the baby boomers retired? This is where we are and now you know how it happened! We have been inundated by the propaganda of Wall Street, Fee Bases Advisors, and many CPAs to max fund your 401K or IRA without the consideration of future tax hikes, and the risks in retirement that a stock portfolio, real estate, savings account, or Bonds only COMPOUND! I am going to let you in on some knowledge that will affect your financial position not only now but in the future.

Do you realize that just a 1% fee in a 401K over a period of 30 years will reduce your income by 1/3rd and the average fee in a 401K is 2.99% nationwide.

58% of people in America don't even think that there is a fee, and up until a couple of years ago they didn't have to disclose those fees. People will have less than half their and that is before taxes which will reduce your income even more from 20% to 50% and even more. The truth is, you can go to any street corner and find two or three financial advisors, even a CPA who is willing to give you the same pretax wealth building financial advice. And if you go to these people, you are going to get that same traditional conventional wisdom that you have heard your entire life. I have a couple of questions for you.

1. Why haven't your fee based advisors ever told you about this, what I have just said before and

2. Why don't they tell you about the risks in retirement that a stock portfolio will only compound such as the #1 fear in retirement RUNNING OUT OF MONEY BEFORE YOU RUN OUT OF LIFE, WHAT ABOUT SEQUENCE OF RETURNS RISK, IT WILL DECIMATE YOUR RETIREMENT, LONGEVITY RISK, WHICH IS A RISK MULTIPLIER, MARKET RISK, GOVERNMENT RISK, TAX RISK AND MANY OTHERS, is it because they are paid a fee whether you make money or not? I am not only a Fiduciary but a certified Financial Fiduciary which means I have a moral and legal obligation to look out for the best interest of my clients.

I have been published on over 365 publications across the America, authored or co-authored 6 books on finances and taxes, spoken at Harvard and West Point, interviewed on ESPN been seen in or on ABC, CBS, NBC, Fox, CW, and am a Wealth Strategist on CNTV Consumer News Network.

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I HAVE A NATIONAL PODCAST ALSO AND A YOUTUBE  
CHANNEL WITH MANY VIDEOS!

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Now everyone has their opinion and me as well, but the information that I will give you is based of Scientific, Mathematical, and Economic facts that I learned from the PHDs in retirement who do not belong to a company or sell products but know what it takes to have the optimum retirement.

If anything, that I said would be of interest to you please call me at **910-551-1046**, or email me at [strategicwealth0@gmail.com](mailto:strategicwealth0@gmail.com), also my website is [www.strategicwealthstrategies.com](http://www.strategicwealthstrategies.com).

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I WANT TO THANK YOU FOR READING AND LOOK FORWARD  
TO EDUCATING YOU ON FINANCIAL STRATEGIES THAT  
WILL SECURE YOUR RETIREMENT PLUS OTHER THINGS  
YOU MAY OR MAY NOT BE AWARE OF. IT WILL CHANGE  
YOUR FINANCIAL FUTURE.

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