Delaware Life®

Delaware Life Income Planning Institute®

# Hidden tax traps

Looking for ways to gather more assets while helping clients avoid potential tax pitfalls? This timely program discusses how to utilize the 1040 tax form to determine if clients have additional cash reserves that can be better positioned for long-term growth. In addition, it highlights potential tax liabilities associated with a client's underlying investment portfolio, and provides strategies for creating tax-efficient retirement income plans.

## This program will help you:

1. Uncover client assets using the 1040 tax form.
2. Gain insights on hidden tax traps and how to help clients avoid unintended consequences of nonqualified taxable investments.
3. Discover ways to create tax-efficient income distribution plans for life.
4. Empower and compel clients to take action on their retirement income plans.

## About National Sales Consulting (NSC)

The directors on the Delaware Life NSC Team provide advanced sales and planning expertise on a variety of income, tax, estate, and financial planning topics, along with actionable ideas and resources for effective client engagement. They also consult on business development topics including sales training, team building, and leadership development.

The team averages over 30 years of industry experience, their workshops offer valuable education, and their practice management strategies help simplify complex planning issues for clients. The team's objective is to help financial professionals be successful and create a competitive advantage.

## About Delaware Life

We’ve made it our mission to deliver value and results to everyone we work with by:

- Building our client-focused products with straightforward features, appealing indexes, and reasonable fees—plain and simple.
- Making products available to knowledgeable financial representatives who deliver those products with clarity and integrity to help clients make smart decisions to protect their savings and build for the future.
- Creating a seamless, accurate service experience you can rely on from the first moment you contact us.

For more information on these strategies, please contact the Delaware Life National Sales Consulting team at:

- **844.DEL.SALE (844.335.7253)**
- **SalesSupport@DLMarketing.com**

Visit the Delaware Life Income Planning Institute® website at Delawarelife.com/advisors. (First-time visitors will be asked to register.)

**delawarelife.com**

This communication is for informational purposes only. The tax information contained in this material is based on federal laws existing on the date of its publication. It is not intended to provide, and should not be interpreted as, individualized investment, legal, or tax advice. To obtain such advice, please consult with the appropriate professional.

Delaware Life Insurance Company (Zionsville, IN) is authorized to transact business in all states (except New York), the District of Columbia, Puerto Rico, and the U.S. Virgin Islands, and is a member of Group One Thousand One, LLC (Group1001).

**FOR FINANCIAL PROFESSIONAL USE ONLY. NOT FOR USE WITH THE PUBLIC.**