

Upcoming Chapter Meeting: AAI Denver



Date: Thursday, February 21, 2013

Topic: Annuities for Income: It's the Fit That Counts!

Speaker: Mike Nekoerad, CLU, Mutual of Omaha Investor Services

With interest rates at frustratingly low levels, and with people looking hard for income and safety, one serious choice worth exploring is the world of annuities. There are often strong tax benefits of taking income from an annuity rather than from bonds or stocks. But the various major annuity product structures make the whole area confusing to many. Financial media writers offer quite strong and often differing opinions; the key point is suitability for an individual or couple's specific circumstances. Just as with stocks or mutual funds, no one size fits all.

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