

Video Objectives

- **Understand the tradeoffs between:**
 - **traditional and Roth retirement contributions &**
 - **traditional to Roth IRA conversions**
- **Show accumulated wealth and U.S. federal & state income taxes impacts of:**
 - **contributions to traditional versus Roth retirement accounts made while working**
 - **conversions of traditional retirement assets into Roth assets during lower income tax years**
 - **using consumer customizable lifetime financial projection software**