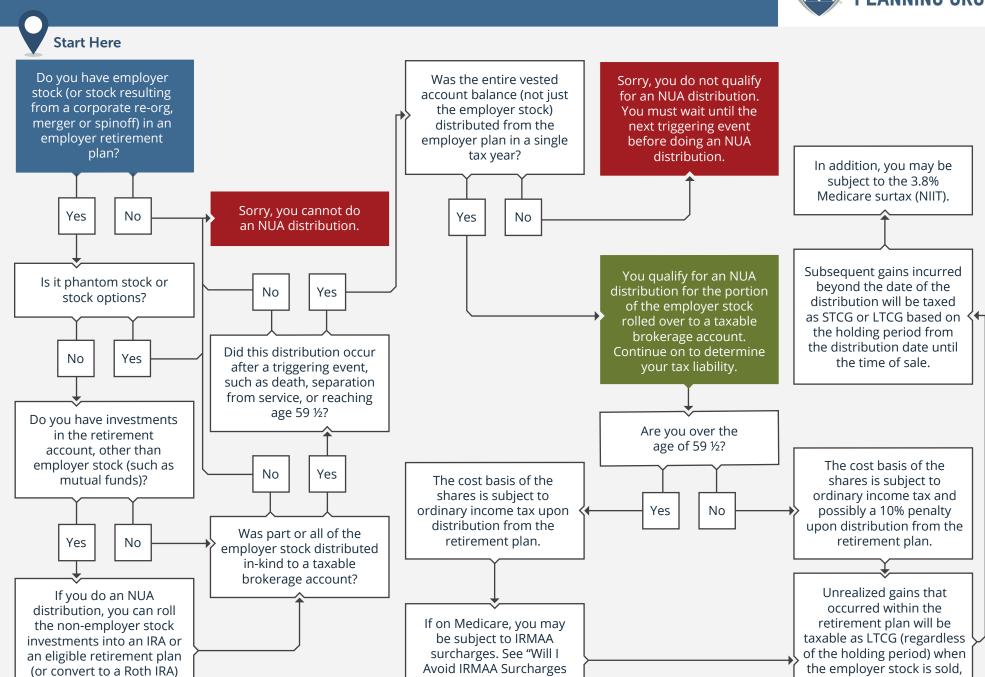
2024 · CAN I DO A NET UNREALIZED APPRECIATION (NUA) DISTRIBUTION?



but not subject to the 3.8%

Medicare surtax (NIIT).



to potentially minimize

your tax liability.

On Medicare Part B &

Part D?" flowchart.



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Please contact The Retirement Planning Group for more complete information based on your personal circumstances and to obtain individual investment advice.

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