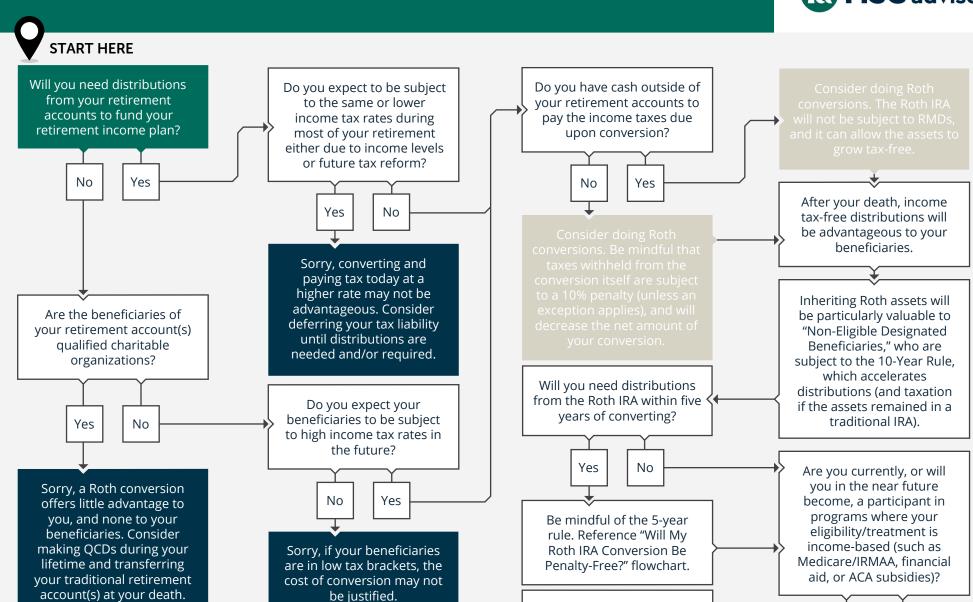
## 2025 · SHOULD I CONSIDER DOING A ROTH CONVERSION?



Yes

No



Low asset valuations (due to a market correction, etc.)

or expiring carryforwards

and credits could provide

additional incentives to do

a Roth conversion.

Increasing your income

with Roth conversions

could impact the amount

you pay/receive through income-based programs.

Reference "Can I Do A

**Oualified Charitable** 

Distribution From My IRA?"

flowchart.

## Rise Advisors, LLC



Advisory services offered through Rise Advisors, LLC ("Rise"), a Registered Investment Adviser. *This report is being generated as a courtesy and is for informational purposes only.* 

## **Rise Advisors**

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