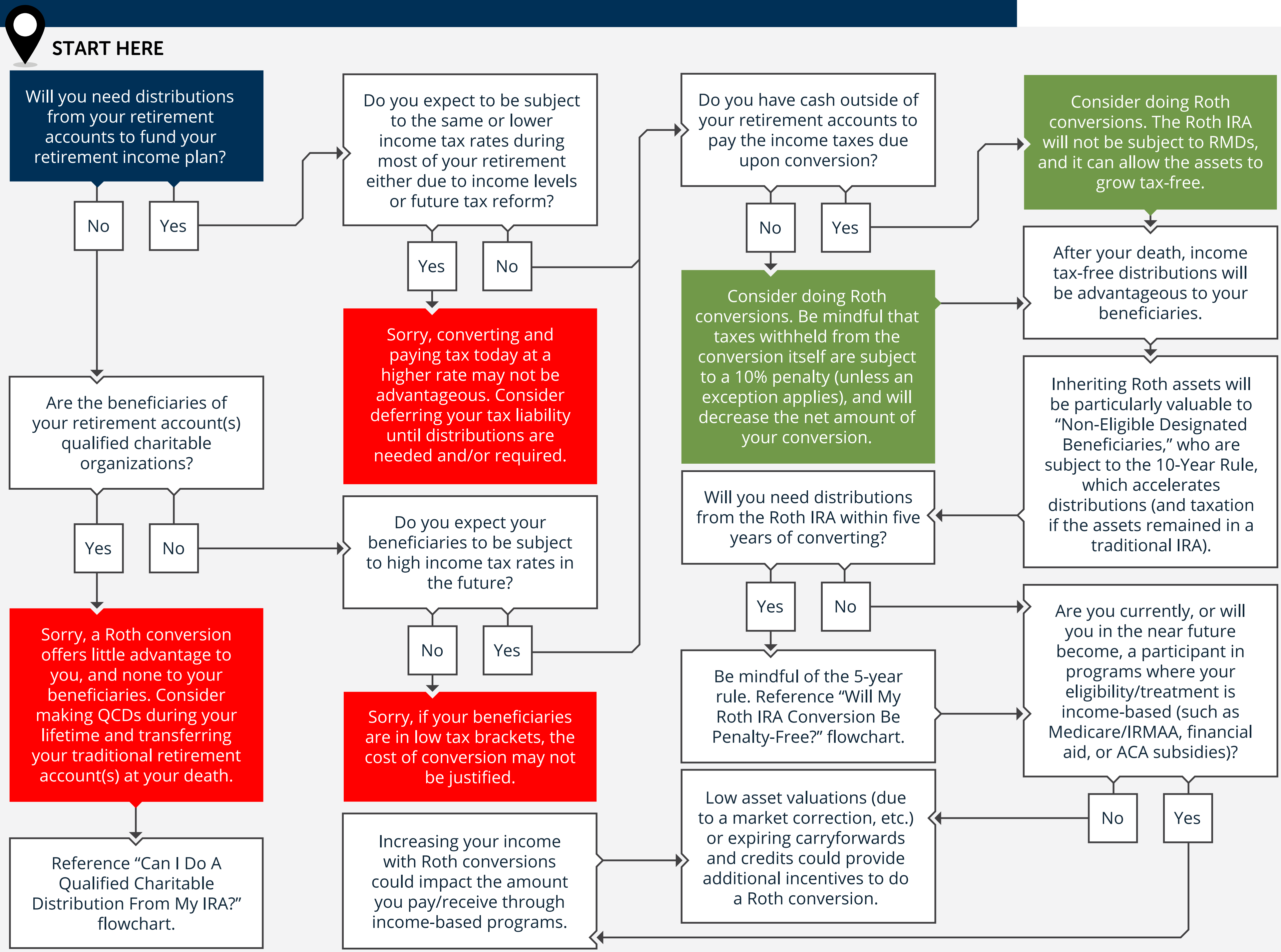
2026 · SHOULD I CONSIDER DOING A ROTH CONVERSION?

COVENANT WEALTH ADVISORS



SCHEDULE YOUR FREE STRATEGY SESSION TODAY

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The checklist showed you what to think about. A Strategy Session tells you what to do.

You downloaded this because of one decision. But retirement decisions don't sit in isolation — when you claim Social Security changes your tax bracket, your bracket changes what a Roth conversion is worth, and what you convert changes your Medicare premium two years later.

A Strategy Session is a **45-minute conversation with a CERTIFIED FINANCIAL PLANNER™ professional** who looks at all of it together.

You'll leave with:

- A direct answer to the question that made you download this checklist
- Our read on where the largest dollar impact likely sits in your situation — and which moves matter less than you'd think
- An honest assessment of whether you need an advisor at all

No sales pitch. No product recommendations. No obligation. If you're on track and handling this well on your own, we'll say so. That happens more often than you'd expect.

[SCHEDULE MY FREE STRATEGY SESSION]

Prefer to talk first? Call (804) 729-5265 or email info@mycwa.com

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