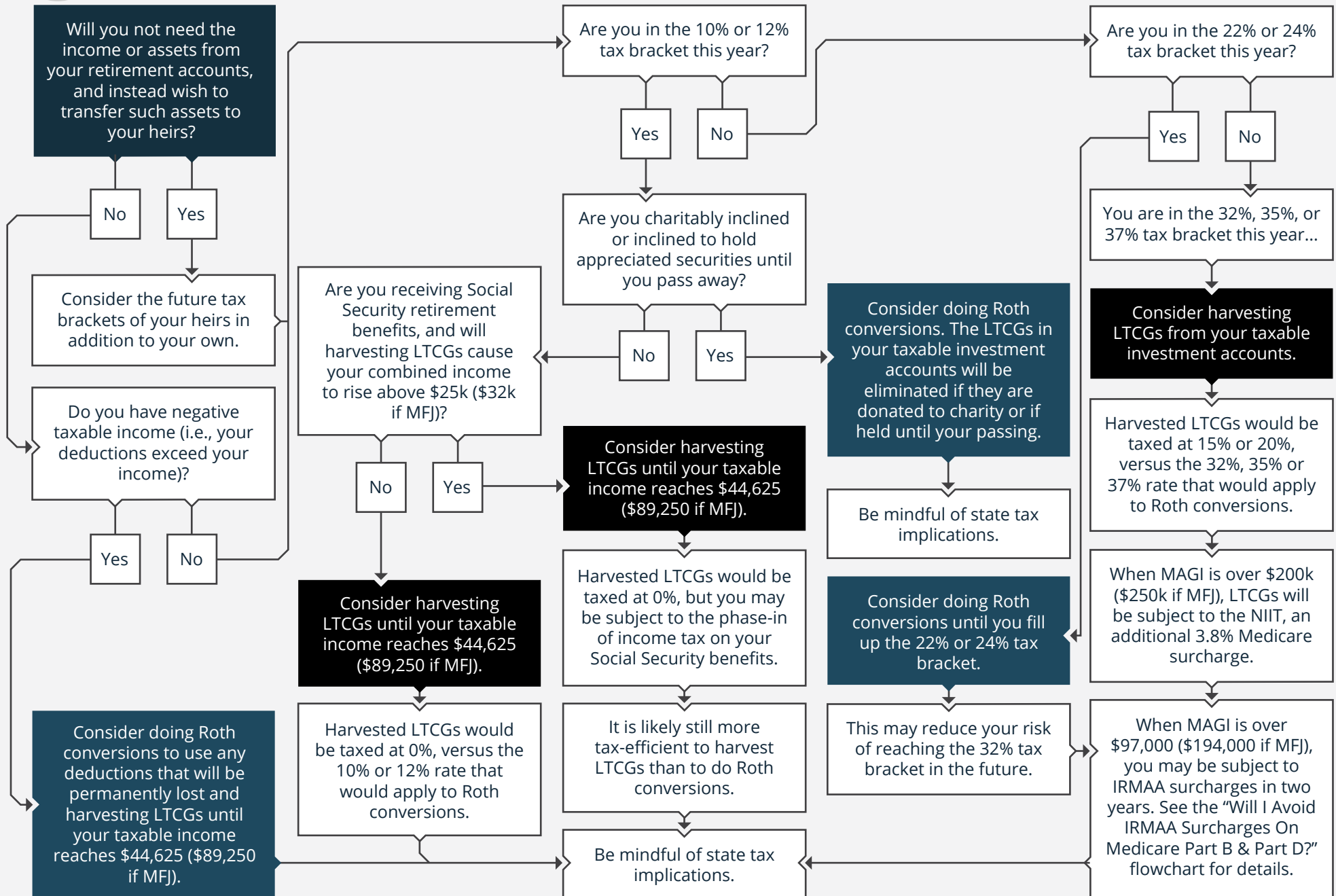


2023 · WHAT WILL HAVE THE LEAST TAX IMPACT: HARVESTING CAPITAL GAINS OR ROTH CONVERSIONS?

Start Here



Elizabeth L. Whitteberry, RMA®, CFA®, CIPM®, AIF®, ChFC®



Elizabeth L. Whitteberry specializes in Retirement Income Planning, Tax Minimization Strategies, Wealth Management, Investment Management, Risk Management, Estate Planning, and Gifting Strategies.

Securities offered through J.W. Cole Financial Inc. (JWC) Member FINRA/SIPC. Advisory Services offered through J.W. Cole Advisors, Inc. (JWCA). Best Path Advisors and JWC/JWCA are unaffiliated entities. The named advisor(s) and JWC/JWCA do not provide tax or legal advice. Always discuss any tax or legal matters with an appropriate professional.

Elizabeth Whitteberry

105 Quail Run Street Colleyville, TX 76034

liz@bestpathadvisors.com | 817-849-1375 | www.bestpathadvisors.com