

Presentation: Retirement Plans - Efficient Ways to Shelter Personal and Business Income from Current Taxes

There are several types of retirement plans for self employed individuals and small business that can shelter income from current taxes. The seminar examines the unique features of these plans and how they can be tailored to the specific needs of a small business.

More information about Jonathan Lindvig



Jonathan S. Lindvig is a founding partner of Peachtree Wealth Advisors. He is a graduate of the University of Georgia (BA Economics) and the Hong Kong Baptist University Summer Program. Before opening Peachtree Wealth Advisors in 2004, Jonathan was a Staff Accountant at Arthur Anderson prior to joining Morgan Stanley as a Financial Advisor.

Over his 18+ year career in the wealth management industry, Jonathan's focus has been providing retirement planning, insurance and investment management solutions that help families achieve their financial goals.