Quick Reference Tax Guide

From income tax brackets, exemptions and deductions to contribution plan limits and education incentives, this handy one-page guide compiles key IRS guidelines for the tax year.



Download Guide

What's Inside

- Tax Rates
- Personal Exemptions
- Education Incentives
- Social Security

Back to Tax Center

Tax Topics

- How Tax Deferral Works
- How Capital Gains Are Taxed
- When do I take a Required Minimum Distribution?

- Qualified Plans
- Traditional and Roth IRAs
- Long-term Care Insurance
- RMDs Uniform Lifetime Table

Related Products

- EliteDesigns® Variable Annuity
- EliteDesigns® II Variable Annuity
- <u>SecureDesigns® Variable Annuity</u>
- Variflex® Variable Annuity

Tax Management Strategies

- Fixed Period Annuity Option EliteDesigns®
- Fixed Period Annuity Option EliteDesigns® II

Neither Security Benefit nor its affiliates are fiduciaries. This information is general in nature and intended for use with the general public. For additional information, including any specific advice or recommendations, please visit with your financial professional.

Security Benefit does not provide accounting, legal, or tax advice and nothing contained herein should be construed as such advice. Please consult your own accounting, legal, or tax advisor.

SB-10005-12 | 2025/01/03