

Learn About IRAs!

Let's cover some IRA basics. At Caplo we offer a variety of IRA options and depending on your age and income you can choose from the following types of IRAs:



Traditional IRA

A qualified retirement account where you may be able to deduct some or all of your contributions the year they are made.



Roth IRA

With a Roth IRA, your money grows tax deferred and you can make tax-free withdrawals during retirement.



Self-Directed IRA

A retirement account that offers access to alternative investments in the private market beyond traditional stocks and bonds.

As fiduciary advisors, we exercise a duty of care and loyalty to our clients by promoting financial literacy.

Caplo Advisory aims to guide you through the financial evaluation process, helping you calculate your Social Security retirement benefits and other essential retirement elements!