

3 MORE WAYS

MEMBERSHIP PAYS

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Can also call for appointment

SCHEDULE YOUR
REVIEW TODAY



401 (k) OPTIONS

WE CAN HELP YOU :

DISCOVER CHOICES
FOR YOUR PREVIOUS
RETIREMENT PLAN

AVOID FEES
& MARKET LOSS

AVOID A DEFAULT
401 (k) ELECTION

1

3

2

RETIREMENT OPTIONS

WE CAN HELP YOU:

COMPLETE RETIREMENT
DOCUMENTS

KNOW YOUR NUMBERS
BEFORE RETIRING

DISCUSS ELIGIBILITY &
SURVIVOR BENEFITS

TSP OPTIONS

PRIOR UNIFORM OR CIVILIAN SERVICE

TRADITIONAL IRA / ROTH IRA PLANS

AVOID SURPRISES AND MISTAKES