

Presenting

FIVE QUESTIONS TO ASK ABOUT YOUR 401(K)

How well do you know your own retirement savings?

ARE YOU TAKING ADVANTAGE OF EMPLOYER-MATCHING?

This is where an employer contributes the same amount to your 401(k) that you do. It's one of the most powerful ways to grow your retirement savings!

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DO YOU KNOW WHICH INVESTMENT OPTIONS ARE RIGHT FOR YOU?

Maybe you know what your options are, but not which to choose or why. Besides your risk tolerance, some investments may not be the most tax efficient.

DO YOU KNOW WHAT INVESTMENTS ARE IN YOUR 401(K)?

401(k)s often come with a myriad of investment choices. Some may be too risky for your goals, while others may be too conservative. Do you know which is which...and which you're invested in?

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IS IT TIME FOR A SECOND OPINION?

Your 401(k) can be an invaluable retirement savings tool...if it's used correctly! To learn whether it's possible to get even more out of your 401(k), consider scheduling a second opinion review with us!

401(K) OR IRA? OR BOTH?

Depending on where you work, what options are available, and what your goals are, you may be better served by using an IRA or Roth IRA instead of a 401(k).

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To schedule a free review of your 401(k), call our office today!