

Navigating Changes to Your Retirement Savings:

Making the Right Financial Choice for Your Future

You've been working hard to secure your future and build up your retirement savings. When there's a change in your employment, whether you're moving to a new employer, retiring, or still deciding, there's an important financial choice ahead of you: figuring out what to do with your savings to make sure you're still on the right path towards your financial goals.

We're here to help

The options below can help you gain a better understanding of the choices available to you and speaking with one of our financial advisors who have navigated these decisions with many other individuals can help ensure you're still on track to achieve your dreams.

Options Available

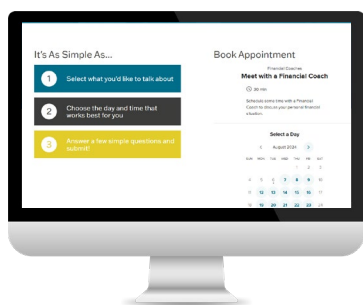
- 1 Rollover your money to an IRA account
- 2 Transfer your money to your new employer's retirement plan *(subject to the new plan's rules)*
- 3 Keep your money in your prior employer's retirement plan
- 4 Take a cash distribution

Key Considerations

- 1 Withdrawal penalties
- 2 Withholding rates
- 3 Distribution rates
- 4 Future tax implications

Next Steps:

Visit mypersonalsage.com or scan the QR code below to schedule a complimentary 1-on-1 meeting. We look forward to discussing your personal situation and guiding your path to a prosperous retirement.



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