

ROLLOVER YOUR 401(K)

Help ensure that your retirement plan is ready for you. Together we will...

- ➔ *Gain an understanding of your retirement finances*
Assess possible outcomes and weigh your options.
- ➔ *Establish your priorities*
Distinguish between your needs and your wants.
- ➔ *Determine how much you need to retire*
Share your personal income statement with your financial advisor.
- ➔ *Take control of your plan for retirement*
Consider the variables you can control and those you can't.
- ➔ *Develop a process for managing your investment*
Work with your financial advisor to establish a comprehensive, dynamic plan for the future.
- ➔ *Plan your next steps*
Make an appointment with your advisor to determine whether your plan is on track.

To discuss your 401(k) options please contact [First Name].

[FA Name]
VP/Financial Advisor

566.212.5444

email@fultonmortgage.com

FULTON FINANCIAL ADVISORS



fultonfinancialadvisors.com

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