

RETIRE ON YOUR TERMS AND YOUR TIMELINE.

If you have questions about any of the boxes below, call to schedule a complimentary review of your situation.

Retiring BEFORE age 59½?		Retiring AFTER age 59½?	
Just because you are retiring from one job before you can take penalty-free distributions from your 401k plan doesn't mean you can't retire!		After age 59½ you have even more income options to fund your retirement years.	
<input type="checkbox"/> Do you plan on working part-time or starting a secondary career? Yes <input type="checkbox"/> No <input type="checkbox"/> What will be your monthly income:		<input type="checkbox"/> 401k Withdrawal Plan By waiting until after age 59½ you are able to start using your 401k plan as part of your retirement income strategy without penalties.	Monthly payment:
<input type="checkbox"/> Can you live on a reduced budget until age 59½? Yes <input type="checkbox"/> No <input type="checkbox"/> Monthly Budget:		<input type="checkbox"/> Will you live on a reduced budget in retirement?	Yes <input type="checkbox"/> No <input type="checkbox"/> Monthly Budget:
<input type="checkbox"/> Fill the GAP: Do you have other savings or investment accounts to use until you reach age 59½ and can begin drawing from your 401k plan?	List accounts:	<input type="checkbox"/> What age do you plan on claiming Social Security? You can claim early at age 62 but can maximize your benefits by waiting.	Age: Monthly SS Payment:
<input type="checkbox"/> Do you have healthcare options until you turn 65 and can apply for Medicare? Yes <input type="checkbox"/> No <input type="checkbox"/>		<input type="checkbox"/> Do you have healthcare options until you turn 65 and can apply for Medicare? Yes <input type="checkbox"/> No <input type="checkbox"/>	
<input type="checkbox"/> 401k Plan Options You have a variety of options for your past employer 401k plans to help them continue to grow until you start taking distributions from it.	Do you have a 401k plan? Yes <input type="checkbox"/> No <input type="checkbox"/> Are you over 55? Yes <input type="checkbox"/> No <input type="checkbox"/> Did you know you can access your 401k plan without penalty at 55? Ask us how.		

WHAT IS YOUR EVER WEALTH PLAN?

We can guide you through these questions and help map out a path to early retirement.

Schedule a retirement review today!



(260) 927-0226

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