We believe that everyone deserves to have a financial advocate. Whether it's solutions for your long term goals or strategies that need to be implemented today, our team will provide the essential resources and support you need to help you achieve your financial objectives.

Join the Atrium Financial Experience

Changing Jobs? Retiring? Take Your 401(k), 403B and Roll It!

If you've lost your job, are changing jobs, or retiring, you may be wondering what to do with your 401(k) or 403B plan account. It's important to understand your options including the answers to:

:: What will I be entitled to?
:: Should I roll over to my new employer's 401(k), 403B or to a new IRA?
:: What if I really do need to use the money?
:: What about outstanding loans?
:: Will my retirement assets generate enough income?

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Navigating Your Financial Future

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