



## **401k Considerations**

- ARE YOU OVER 50?
- DO YOU HAVE A 401K PLAN?
- DOES YOUR PLAN ALLOW IN-SERVICE ROLLOVERS?

In-service rollovers allow an employee, employed with the firm offering the 401k Plan, to roll a portion of their 401K to an IRA and personally manage that portion.

By doing this, you may have access to more investment options than your Retirement plan allows.

IF THE ANSWERS TO ALL THREE QUESTIONS ARE YES, PLEASE CALL US TO DISCUSS THE PROS AND CONS OF THIS STRATEGY AND HOW IT CAN BENEFIT YOU AND YOUR RETIREMENT PLANNING.

Questions? Call Travis: 505-717-1111

