

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

Rollover your money to an IRA

Transfer your money to your new employer's retirement plan
(subject to the new plan's rules)

Keep your money in your prior employer's retirement plan

Take a cash distribution

KEY CONSIDERATIONS

Withdrawal Penalties

Withholding Rates

Distribution Rules

Future Tax Implications

Next Steps:

Call, email me, or scan the QR code to directly to schedule a complimentary 1-on-1 meeting. Let's discuss your personal situation and how to best navigate your path towards a prosperous retirement.



Patrick Abelon CRPS[®], CRC[®]

Financial Wellness Consultant

804.305.7208

pabelon@sageviewadvisory.com



**CLICK HERE OR SCAN THE QR
CODE TO SCHEDULE A MEETING**