Retirement Planning and Lump Sum Distribution Analysis

During this complimentary lunchtime presentation we will discuss the importance of developing a plan to help you address the challenges of retirement, including the following:

- The different phases of retirement and how you can use your tools and resources to achieve retirement goals.

- Determining monthly income needs and methods to generate retirement income.

- IRA rollover regulations and strategies to consider.

- IRA distribution rules before 59 1/2 and at 70 1/2.

Hosted by: The Brown and Brown Wealth Management Team at Morgan Stanley

Location: Please call Amy or Deb at 630-245-6083 for details

Date: October 18, 2018: 12:00 PM to 1:00 PM

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