

# *“What Should I Do With My Retro Check?”*

- What’s better than Tax Deferred? Tax Free with NO required minimum distributions! Speak with a financial advisor at the Financial Planning and Education Center to open a **Roth IRA**.
- Do you have children or grandchildren? Use your retro check to open a Tax Free education fund for grammar school, high school or college. Speak with a financial advisor to learn about your **education funding** options.
- Invest in a **fixed income option** to weather market volatility for the next 3 - 5 years and receive better terms than a typical “CD” rate.

## **The Power of Partnership**

Financial services offered include:

- Financial planning - analysis, portfolio development, asset allocation, investment selection, on-going monitoring and recommendations
- IRAs - Roth and Traditional
- Education Savings Programs - 529 Plans and Education IRAs
- Annuities and Insurance
- Retirement Planning
- Distribution Strategies for your 457 deferred compensation plan
- Rollovers – for you or your spouse, including: 457, 401(k), or 403(b) plans and widow's annuity

**Call the Financial Planning and Education Center**

**(312) 499-8888**



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