Have you changed jobs or retired?

If so, you may have the option to receive a lump sum distribution from your employer's retirement plan.

Are you ready to make the move?

If so, you may have the option to receive a lump sum distribution from your employer's retirement plan. Are you ready to make the move?

Let Oppenheimer help you learn about your options!

Oppenheimer Financial Advisors can help you tackle the tough questions:

- Should you rollover your 401(k) to an IRA or leave it where it is?
- Should you invest in a Traditional or Roth IRA?
- Will you be subject to RMDs (Required Minimum Distributions)? How will that affect your retirement planning?
- What type of assets can be left to your beneficiaries?
- What is the best way to invest your assets?
- What distribution strategies are available for using your retirement assets?
- Will you outlive your retirement savings?

For Federal Retirees

Our experience includes:

We are knowledgeable with Federal pension programs and other Federal benefits.

Transferring Thrift Saving Plan (TSP) assets from the accumulation phase to the planning phase in retirement for income, diversification and possible protection with a portion of these assets.

Working thru the complexity of the transfer process and options before and after your retirement.

Planning for your long retirement and your cash flow needs that may be required throughout your retirement years.

Legacy planning

Contact me today!

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