

Leave It, Move It, Roll It, Take It: Know Your Employer Retirement Plan Options

Leave It, Move It, Roll It, Take It: Know Your Employer Retirement Plan Options is a 40-minute educational program that outlines the potential advantages and disadvantages of various retirement plan distribution options.

OUTLINE AND SUGGESTED TIMING

Welcome/Key Steps to Financial Success	4 minutes
Your Options	6 minutes
Leave It with Your Former Employer	6 minutes
Move It to Your New Employer	4 minutes
What Is an IRA?	3 minutes
Roll It to an IRA	5 minutes
Stretch IRAs	4 minutes
Take a Lump-sum Distribution	3 minutes
Receive Annuity Payments from a Pension	2 minutes
Summary/Close	2 minutes
Q&A/Thank You	Time varies

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