Rollover Planning

When retiring or starting a new job, understand the options for your existing retirement savings.

FROM: **[REP NAME], [PROGRAM NAME]** Representative

TO: **[FINANCIAL INSTITUTION NAME]** Customer **[CUSTOMER EMAIL]**

SUBJECT: Rollover Planning

DATE: June 30th at 6PM Eastern

Often times when people change jobs or prepare for retirement, they need to make decisions on their retirement plans and pensions. In this virtual seminar, you'll learn some of the rules we need to follow and the options available.

In this session you will learn the answers to questions, including:

- Pros and Cons to leaving your money in the company plan
- Possible taxes or penalties we may face when moving money
- Options for moving it your new company plan
- Rolling it over to a personal IRA

Reserve your virtual seat. (Link to WebEx registration)

Space is limited, so I urge you to make your reservations today. And give me a call at [REP PHONE] with any questions about the virtual seminar or contact me by email at [REP EMAIL]. I look forward to seeing you virtually.

[REP NAME]
[REP TITLE]
[PROGRAM NAME]
Located at: **[FINANCIAL INSTITUTION NAME]**
[ADDRESS]
[CITY], [STATE] [ZIP]
Phone: **[REP PHONE]**

This workshop is educational only and is not investment advice. If you need advice regarding your financial goals and investment needs, contact a financial advisor. There are distinct differences between annuities and certificates of deposit. Most certificates of deposit are short-term investments. Some of the products featured in this workshop are annuities and are sold by prospectus. Annuities are long-term insurance products designed for retirement purposes.

Many registered annuities offer four main features: (1) a selection of investment options, (2) tax-deferred earnings accumulation, (3) guaranteed lifetime payout options, and (4) death benefit options. Before investing, you should consider the annuity's investment objectives, risks, charges and expenses. The prospectus contains this and other information. Please read it carefully. To obtain a prospectus, contact your advisor, log onto membersproducts.com or call 888.888.3940.

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