



CUNA MUTUAL GROUP

## Understanding Your Rollover Options

Changing jobs is a common experience for most U.S. workers. But, what's the right thing to do with your retirement savings plan account from a previous employer? What are your options, and how can your decision impact your long-term retirement savings?

Here's an opportunity for you to get a clear understanding of your different options, and how each one can affect your progress toward your retirement savings goals — at no cost and no obligation:

### Understanding Your Rollover Options

6PM on May 10<sup>th</sup>

Presented by, Travis P. Stanley, BFA™ NSSA™ RICP™ CSS™

You'll get a clear understanding of the different options available to you when you leave an employer and have an employer-based retirement savings plan account balance to consider, including:

- Four major options for retirement plan balances when changing jobs
- Pros and cons of each option
- How a Rollover works
- And more

[Click here to reserve your virtual seat NOW](#)

You are welcome to bring a guest, but space is limited so please make your reservations today.

Give me a call at **616.243.0125 x 1205** with any questions about the seminar or contact me by email at [jimb@adventurecu.org](mailto:jimb@adventurecu.org)

I look forward to seeing you there!

James Bird

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