Guiding Your Clients With Their Retirement Accounts

As a financial professional, you understand the pivotal role that an employer-sponsored plan, such as a 401(k) or 403(b), plays in your clients’ retirement strategies. We offer value-add resources to help you with the knowledge and tools you need to provide top-tier guidance to your clients.

The content in this section is designed to help you deliver clear, strategic guidance relevant to your client's retirement accounts - whether an employer-sponsored plan or IRA. Our client-facing Guide to Rollovers article can easily be shared by clicking the “Email Your Clients” link in the Shareable Content section below. In addition, we offer several other resources below to assist you and your clients with the management of retirement accounts.

Read the Client Guide

Related Value-Add Marketing Resources

Brochure - Guide to Rollovers

A brochure advisors can share with clients about rollovers of retirement accounts, whether an employer-sponsored plan or IRA.

Download the Brochure >

Financial Professional Guide - When Your Clients Divorce

A guide for you on how to handle divorcing clients.

Download the Guide >

Seminar - Who Will Get Your IRA Assets?

A presentation for clients on IRA beneficiaries.

Download the Seminar >

Seminar - Designing Your Retirement Blueprint

A seminar for your clients on retirement planning.

Download the Seminar >

Brochure - Guide to Hardship Distributions

A handout for your clients on taking hardship distributions.

Download the Brochure >

Shareable Content

Share "Guide to Rollovers" with your clients.

Email Your Clients

Related Resources

- Life Stage Investing for Your Clients
- Introducing Annuities to Your Clients
- More Value Add Resources

FINANCIAL PROFESSIONAL USE ONLY

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