



Get the most  
out of your  
retirement.

**Are you contributing from your paycheck  
without a clear retirement plan?**

### We can help you:

Review and help manage your largest retirement asset—your employer retirement plan.

Provide a customized strategy and schedule regular annual reviews.

Help you retire on your terms with guidance along the way.

Coordinate planning, investments, and insurance so everything works together.

**5.2%**

The estimated annual value a financial advisor can provide to a typical client portfolio based on a \$250,000 account.<sup>2</sup>

**77%**

of Americans are anxious about their financial situation.<sup>1</sup>



**It's time to  
take control of  
your financial journey.**

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Source: Capital One/Decision Lab "Mind Over Money" study, cited by CNBC, 2020–2022. NYSSCPA

2. Source: Russell Investments, "Value of an Advisor" study and related research on the value of an advisor formula. Russell Investments

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