Rollover Planning | Wednesday, September 29, 2021

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.

The Service 1st Retirement & Investment Center, invites you to join us for a virtual seminar on this important topic. This online event is a free educational opportunity. There is no cost and no obligation to attend.

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 to your new company plan
- Rolling it over to a personal IRA

Presented by: Travis Stanley, Regional Sales Director, CUNA Mutual Group

When: Wednesday, September 29, 2021 at 6:00 PM EST
Visit https://bit.ly/2WMcu5i to reserve your virtual seat. (Link to WebEx registration)

Place: Virtual sessions via WebEx (You must have a device with internet access.)

For more information

Call Matt Defalco, Financial Services Coordinator, Service 1st at 800.562.6049 ext. 7597 with any questions about the virtual seminar or contact Gary Surak,* Vice President, Wealth Management, Service 1st Retirement & Investment Center at 800.562.6049 ext. 7596. We look forward to seeing you virtually.

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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*This advisor is also an insurance agent and some of the products sold are annuities and insurance contracts. Securities sold, advisory services offered through CUNA Brokerage Services, Inc. (CBSI), member FINRA/SIPC, a registered broker/dealer and investment advisor. CBSI is under contract with the financial institution to make securities available to members. Not NCUA/NCUSIF/FDIC insured, May Lose Value, No Financial Institution Guarantee. Not a deposit of any financial institution.