



RETIREMENT PLANNING

BY YOUR BIRTHDAY MILESTONES

Before and after retirement age, there are many financial milestones that happen on or around your birthday. Taking action on many of these milestones can help you meet your retirement goals—and some help you avoid tax penalties.

Keep track of important steps to take with this handy guide.

Let's have a conversation about your upcoming milestones: 855.662.2121.

*Income tax may be due on these withdrawals.

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