



Rollover RESCUE™

When You Need To Rollover Your Retirement Plan
& Don't Know Where To Go

Comprehensive Assistance With Your Retirement Plan Rollover

You either left your employer, lost your job or retired. You have your former company plan - 401k, 403b, 457b still sitting there with your old employer.

What do you do? Do you leave it there and not worry about it? Do you move it to a plan with your new employer? Or do you roll it over to your own IRA? If you choose to roll it over, what do you invest it in? What type of financial vehicle will make the most sense for you and for your goals?



There is no cookie-cutter solution here. This is a highly individual and personal decision and any financial representative who does not look at all your assets, your goals, and the time remaining until your retire is not really helping you in the best manner.

With this service package we help guide you through this decision to make sure you are doing what is right for you.

Schedule your free consultation today for Rollover RESCUE™

The Rollover RESCUE™ service package includes:

- A complimentary consultation to determine what your retirement goals are and understand your personal situation better
- Once we get the right information about your situation we will present you with several options for what to do with your old company plan, including moving it to your new current employer if that is an option available to you.
- Call and work with your old company custodian to make sure it gets moved in the correct manner without any penalties or taxes.
- Assist you with all paperwork until it is moved to where you would like it to go.
- Assist you with selecting the right investments with your new company employer so that it fits your goals and your risk tolerance.



Our goal is to help you make a wise decision with where to put your former company retirement plan by taking a look at possible future consequences of certain options. Call and schedule your meeting today. Ask for a Rollover RESCUE™ appointment!



Call 262-764-4816 - or schedule online at: <https://go.oncehub.com/LegacyLegend>