

RETIREMENT PLANNING PITFALLS

If only they were
that **easy** to
spot.



Avoiding pitfalls is crucial to protecting your assets when planning for retirement. Your retirement nest egg can be a tempting target for would-be “experts” selling high-fee, commissioned products. If you are wondering about ads promising guaranteed returns, bigger Social Security benefits, and tax-free income in retirement, you can meet with a DMBA Certified Financial Planner™ for experienced and unbiased guidance on key topics such as:

- Planning for taxes in retirement
- The pros and cons of Roth conversions
- Social Security claiming strategies
- Managing your 401(k)
- Required Minimum Distribution (RMD) and charitable gift planning
- Understanding Medicare and retirement healthcare plans

Your roadmap for a rewarding
retirement begins at DMBA.





DMBA



Financial Planners

INSPIRING EMPLOYEES TO ACHIEVE LIFELONG FINANCIAL SECURITY



7 CERTIFIED
FINANCIAL PLANNERS™

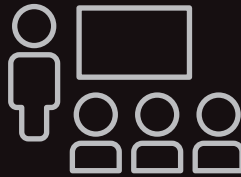
100+ YEARS OF COMBINED
EXPERIENCE

20 PROFESSIONAL DESIGNATIONS

HOW



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consultations



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education

Financial Coaching • Financial Therapy • Retirement Planning

Schedule your retirement consultation or watch our workshop
at www.dmba.com/FinancialPlanning.



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