



401(k) Rollover



When you are near or in retirement, many people consider converting their 401(k) into a fully portable IRA allowing you to regain control of where you place these hard earned dollars. Within an IRA, you have many options.

This is an important time to consider the best place to allocate this money and what you intend to do with these funds. Planning now provides peace of mind that your resources will perform as you desire and you can enjoy a prosperous retirement.



Contact us. We have helped many people make transition with very little effort.

Disclosure: Neither our company nor any agents acting on its behalf, should be viewed as providing legal, tax or investment advice. Consult with and rely on your own qualified advisor. Under current law, annuities grow tax deferred. Annuities may be subject to taxation during the income or withdrawal phase. The tax-deferred feature is not necessary for a tax-qualified plan. In such instances, you should consider whether other features, such as the Death Benefit and lifetime annuity payments are appropriate for your needs.



**FINANCIAL & INSURANCE
SOLUTIONS, INC.**

1008 W. Avenue M14, Suite A/D 172
Palmdale CA 93551
**661.317.3962 | cbgdfinancial@gmail.com
cbgdfinancial.com**