



# RETIREPATH



Complete Consent Form



RetirePath will contact you to fill in details once we get account information from HR.



A Financial Questionnaire and Sharefile link will be sent to complete your profile.



From there RetirePath will walk you through each stage of the Circle of Service.

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## *Circle of Service*



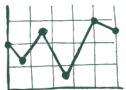
### *Written Income Plan:*

- Retirement Income Planning
- Social Security Optimization
- Pension Flexibility
- Tax Smart Account Distributions



### *Legacy:*

- Survivor Benefit Assistance
- Legacy Planning & Wealth Transfer
- Estate Planning Document Preparation & Completion
- Trust Funding & Maintaining Up-to-date beneficiary information



### *Investments:*

- Comprehensive Asset Management
- ETFs, Stocks & Mutual Funds
- REITs & Alternatives
- Annuities



### *Health Care:*

- Medicare Planning Solutions
  - Part C & D Plans
- Affordable Care Act Plans
- Long-Term Care Coverage



### *Taxes:*

- Tax-Free Income Creation
- Strategic Tax Planning
- Roth Conversion
- Charitable Giving Strategies
- Tax Preparation



### *Protection:*

- Life Insurance
- Disability Insurance
- Supplemental Benefits (ex: Cancer, Identity Theft)

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