RETIREPATH

Complete Consent Form

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

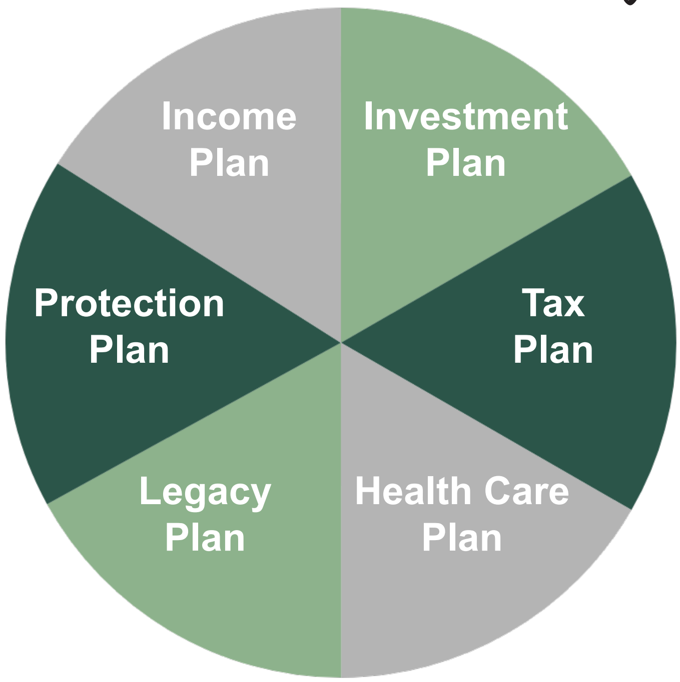
A Financial Questionnaire and Sharefile link will be sent to complete your profile.

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

11300 N. Rodney Parham Rd. Suite 120 Little Rock, AR 72212
theretirepath.com | info@retirepath.net | 501-904-5858

RETIREPATH

Circle of Service



Written Income Plan:

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

Investments:

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

Taxes:

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

Legacy:

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

Health Care:

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

Protection:

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

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