

## RETIREMENT PLAN SERVICES

# Know Your Options

As an associate at LTA II Manufacturing, LLC (LTA), you have access to 401(k) financial advisory services. At LTA we are committed to providing you with an opportunity to plan and invest for your future and eventual retirement. For this reason, we have partnered with Creative Planning.

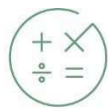
## Services available to you as an associate of LTA

- ◆ 1:1 Retirement planning sessions with a financial advisor that specializes in 401(k)s
- ◆ Retirement plan advice to meet your personal needs and retirement goals
- ◆ Budgeting and debt management education
- ◆ Setting a retirement plan (investment options, deferral rates, rollovers)
- ◆ Information about paying off student loans
- ◆ Information to help save for a new house, car or vacation
- ◆ Information about how to plan and save for education expenses

## Creative Planning services available at an additional cost:



Utilizing a Private Wealth Advisor for ongoing wealth management and financial planning



Tax Planning Services



Legal Services including Wills and Trusts



Trust Administration Services



Risk Management or Insurance Planning which includes Property and Life insurance

## About Creative Planning

At Creative Planning our services are completely in your best interests. We have been nationally recognized for our commitment to excellence in wealth management. A client's portfolio must consider their current financial situation, risk tolerance and long-term goals. But it also must consider all the unique circumstances that apply to your life. That's why we've adopted a comprehensive, goals-based approach to portfolio management services. And we've been doing that for more than 30 years.

We will guide you in selecting the right asset allocation and investment strategy for you, using techniques developed over multiple market cycles. Our goal is to help you plan for life events you expect and overcome those you don't.

## Which option(s) are right for you?

To determine the right level of service for your circumstances, speak with a LTA 401(k) Plan dedicated advisor. They will review your specific retirement plan and provide advice customized to you. Regardless of which method you choose the most important decisions you can make today are getting started and determining how much you need to save for retirement.

**Jay Jasnoski, AIF®**

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