

Resources to Identify Money-In-Motion Planning Opportunities

Career Events



- ▶ Should I Roll Over My Dormant 401(k)?
- ▶ What Issues Should I Consider If I Experience A Sudden Wealth Event?
- ▶ What Issues Should I Consider If I Get A Promotion Or Raise At Work?
- ▶ What Issues Should I Consider If I Lose My Job?
- ▶ What Issues Should I Consider When Starting A New Job?
- ▶ What Issues Should I Consider When Starting A Business?

Family Events



- ▶ What Issues Should I Consider When Getting Married?
- ▶ What Issues Should I Consider When Having (Or Adopting) A Child?
- ▶ What Issues Should I Consider If My Spouse Has Been Diagnosed With A Terminal Illness?
- ▶ What Issues Should I Consider To Fund My Child's College Education?

Retirement



- ▶ What Issues Should I Consider Before I Retire?
- ▶ Should I Take My Pension As A Lump Sum?
- ▶ Should I Roll Over My Dormant 401(k)?

Death of a Loved One



- ▶ What Issues Should I Consider If I Experience A Sudden Wealth Event?
- ▶ Can I Delay The RMD From The Traditional IRA I Inherited?
- ▶ Should I Inherit My Deceased Spouse's Traditional IRA?
- ▶ What Issues Should I Consider Before Closing The Estate?
- ▶ What Issues Should I Consider If My Parent Passed Away?
- ▶ What Issues Should I Consider If My Spouse Passed Away?
- ▶ Will I Receive A Step-Up In Basis For This Inherited Property?

Unique Events



- ▶ What Issues Should I Consider If I Experience A Sudden Wealth Event?
- ▶ Will I Have To Pay Tax On The Sale Of My Investment?
- ▶ What Accounts Should I Consider If I Want To Save More?