Is it Time for Your Account Review?

When should you meet with your local Account Executive to review your Ohio DC account? The answer should not be...the day before you retire. You should regularly review your account before and after retirement. Here are a few suggestions as to when you should schedule an account review:

- If you have not met with your local Account Executive in the last two years.
- If you have undergone any life events, such as marriage, childbirth, or divorce.
- If you are within 5 years of taking distributions.

Make it a priority to schedule an appointment every one or two years to help ensure you are on pace to meet your retirement goals.

Your local Account Executive can help you:

- Review your investment options
- Evaluate your tolerance for risk
- Answer questions about retirement and post-employment withdrawals
- Navigate online tools and calculators
- Understand the difference between pre-tax or post-tax (Roth) contributions, if offered by your employer
- Update your address, email, or beneficiaries

You can also schedule an appointment if you have not started saving for retirement and want to learn more about how to save. **Let us help you enroll!**

Schedule an appointment with your Account Executive today!