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**CONCIERGE**  
CONSCIOUS • FISCAL • VISIONARY

# EXPECT MORE FROM YOUR INVESTMENT MANAGEMENT TEAM



**RETIREMENT**  
RETIREMENT PLANNING



**WEALTH  
MANAGEMENT**



**MEDICARE**  
ENROLLMENT CONSULTING

## LET THE CAPITAL CONCIERGE HELP YOU WITH RETIREMENT OPTIONS

In today's ever-evolving workforce landscape, retirement planning is crucial for individuals at every stage of their careers. Whether you're self-employed, a small business owner, employed by a corporation, or just starting a career, understanding your retirement options is essential for securing your financial future.

### **CONTRIBUTION LIMITS:**

Evaluate the contribution limits of each retirement option to ensure you're maximizing your savings potential.

### **CATCH-UP CONTRIBUTIONS:**

Many types of retirement plans offer higher contribution limits for individuals over the age of 50. Contact your advisor to find out if this opportunity applies to you.

### **TAX CONSIDERATIONS:**

Understand the tax implications of each retirement plan, including tax deductions, deferrals, and withdrawals.

### **EMPLOYER CONTRIBUTIONS:**

If applicable, consider employer contributions, as they can significantly impact your retirement savings.

### **ADMINISTRATIVE REQUIREMENTS:**

Assess the administrative requirements and costs associated with each retirement plan, especially for self-employed individuals and small business owners.

By comparing retirement options across different employment scenarios, individuals can make informed decisions to secure their financial future and achieve their retirement goals. Remember to consult with a financial advisor to tailor a retirement plan that aligns with your unique circumstances and objectives.

**CORBIN MEIREIS**  
*Financial Planner*



**BRIAN ABBOTT**  
*Financial Planner*

Contact us today to find  
the retirement plan that best  
suits your needs and goals.

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