



## Retirement Plan Rollover \$75 American Express Gift Card\* Offer

### Limited Time Offer.

Rollover an old IRA, 401(k), 403(b), 457, or TSA into an IRA with RFCU Financial Services and we'll give you a **\$75 American Express Gift Card**.

If you've changed jobs and left behind a 401(k) or other qualified plan, you could be neglecting one of your most important assets. We can help you manage and monitor your investments, creating a strategy that aligns your retirement savings with your overall financial goals.

- Learn the tax consequences of lump-sum distributions
- Discover the tax advantages of an IRA rollover
- Avoid common 401(k) rollover mistakes

### Trust us to make it happen.

One of our experienced financial consultants will be glad to explain how the rollover process works, assist you with the paperwork, and help you design an investment strategy that's tailored specifically to your needs and financial goals.

*To Do-*  
1. Call Dan Cibotti to rollover  
IRA at 781-878-0232 ext. 146.  
2. Ask about \$75 gift card offer!

**Schedule a no-cost, no-obligation consultation** with a financial consultant to get started. Contact RFCU Financial Services by calling **781-878-0232** or **800-562-7328, ext. 146**.

**\*Limited Time Offer.** Must be an IRA, 401(k), 403(b), 457, or TSA with an account opening value of \$25,000 or more. Offer valid for clients who open a new retirement account through LPL Financial. Must mention RFCU Financial Services web site offer in order to receive a \$75 American Express Gift Card. Limit of one gift card per household. Void where prohibited. **Gift card given no later than 45 days after account is funded.**

Please contact your qualified tax advisor to discuss tax-related strategies.

Securities offered through LPL Financial, member [FINRA/SIPC](#). Insurance products offered through LPL Financial or its licensed affiliates.

Not NCUA Insured	Not Credit Union Guaranteed	May Lose Value
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