

# Executive Review

A Custom Solution® for Jobholders



Are you currently working and trying to rebuild your retirement plan? Let us help you make smart decisions regarding your current retirement plan so you have one less thing on your mind.

- **When did you last review your retirement plan?**
- **Do you understand your plan's investment options?**
- **Do you have more than 10% allocated in your company's stock?**
- **Are you confused by all the choices?**

Each quarter your investment performance will be monitored and analyzed. Based on your investment objective and investment options, we will provide you with recommendations for updates to your allocations.

You will immediately know if you need to make any changes in your retirement plan. The earlier you make changes, the better chance you will have to improve your long-term outcome. Call our office today at **(239) 949-7100** for a quote.



The Custom Solution  
Company®

Securities Offered Through  
LPL Financial Member FINRA/SIPC

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