MONTANTI ADVISORY SERVICES, LLC
DEDICATED TO THE STANDARD FOR EXCELLENCE AND FINANCIAL SUCCESS
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School is now in session!

Let’s check if you’re preparing for retirement and review the following items we’ve listed below.

Contribute to your Retirement Plan

It is imperative to keep track of your retirement plan and set aside a percentage of your income. It’s recommended to save at least 10% of your income for an enjoyable retirement.

Assign or Update Beneficiaries

A critical part of having a retirement plan is to assign the accounts beneficiaries. It’s important to periodically check or update the account after major life events like the death of a spouse, marriage, divorce, etc.

Familiarize yourself with your Company’s Offerings

Does your company offer long-term care insurance and/or healthcare plans? It’s a good idea to be familiar with their benefits and frequently check to see what new perks they offer.

Be Aware of Cyber Security

Cyber-attacks are common and should be recognized by retirement plan participants to ensure their information is safe. It’s essential to frequently update your passwords and educate yourself on cyber security.

For assistance, please contact your financial professional at (561) 620-9260 or vcmontanti@lp.com.

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