



M FINANCIAL WEALTH MANAGEMENT


THE ADVANTAGES OF A ROLLOVER TO A MANAGED PORTFOLIO PROGRAM

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No Tax Cost

Rollover of an IRA does not trigger a taxable event.
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EASY TO EXECUTE

Simple paperwork allows for transfer of an IRA to a managed portfolio.
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ABILITY TO CONSOLIDATE

Multiple tax-deferred accounts can be rolled into one IRA; multiple family IRAs are included in one report.
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RISK-BASED MODEL PORTFOLIOS

Asset allocation modeling aligns time horizon and goals to maximize return relative to risk.
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BROAD DIVERSIFICATION

Up to 14 underlying funds, representing multiple asset classes, and tens of thousands of individual securities.

CONSIDER THESE TYPES OF EMPLOYER PLANS AND IRAs WHEN TALKING TO YOUR ADVISOR ABOUT RETIREMENT SAVINGS:

- Traditional IRAs
- SEP IRAs
- Government 475(b) Plans
- Roth IRAs
- SIMPLE IRAs
- Defined Benefit Plans
- Rollover IRAs
- 401(k) Plans
- Profit Sharing Plans
- Inherited IRAs
- 403(b)(7) Custodial Accounts
- Money Purchase Pension Plans