

# Have you changed jobs or retired?

*If so, you may have the option to receive a lump sum distribution from your employer's retirement plan.*

## Are you ready to make the move?

If so, you may have the option to receive a lump sum distribution from your employer's retirement plan. Are you ready to make the move?

## Let Oppenheimer help you learn about your options!

Oppenheimer Financial Advisors can help you tackle the tough questions:

- Should you rollover your 401(k) to an IRA or leave it where it is?
- Should you invest in a Traditional or Roth IRA?
- Will you be subject to RMDs (Required Minimum Distributions)? How will that affect your retirement planning?
- What type of assets can be left to your beneficiaries?
- What is the best way to invest your assets?
- What distribution strategies are available for using your retirement assets?
- Will you outlive your retirement savings?

## For Federal Retirees

Our experience includes:

We are knowledgeable with Federal pension programs and other Federal benefits.

---

Transferring Thrift Saving Plan (TSP) assets from the accumulation phase to the planning phase in retirement for income, diversification and possible protection with a portion of these assets.

---

Working thru the complexity of the transfer process and options before and after your retirement.

---

Planning for your long retirement and your cash flow needs that may be required throughout your retirement years.

---

Legacy planning

## Contact me today!

### Jerry Jevic, AIF®

Executive Director – Investments

### Oppenheimer & Co. Inc.

222 Haddon Avenue, Suite 301

Haddon Township, NJ 08108

(856) 858-1356 Phone

(833) 562-9867 Toll Free

[jerry.jevic@opco.com](mailto:jerry.jevic@opco.com)

**HADDON TOWNSHIP GROUP**  
of Oppenheimer & Co. Inc.

