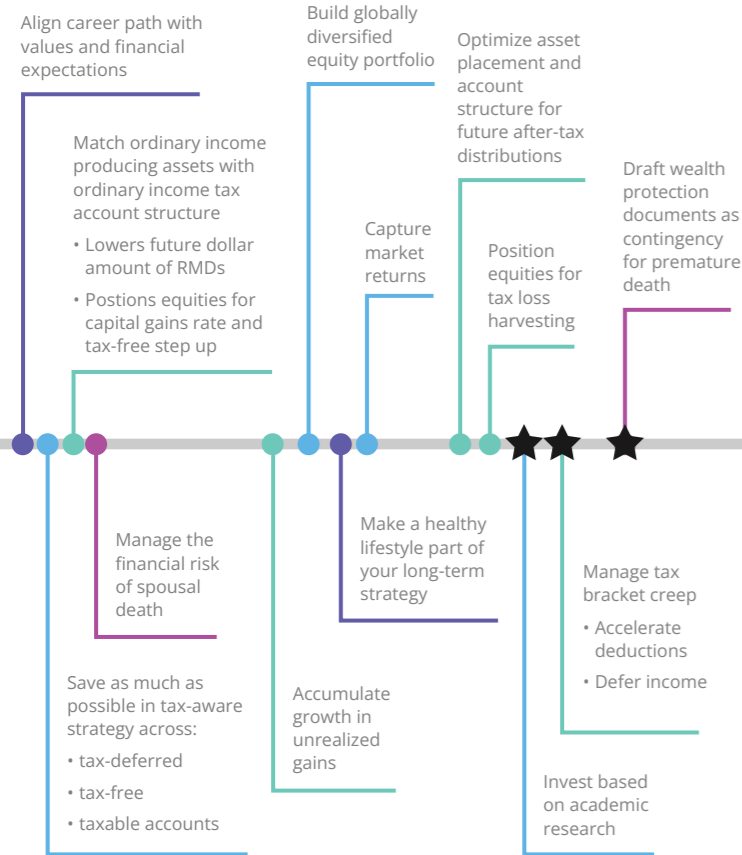


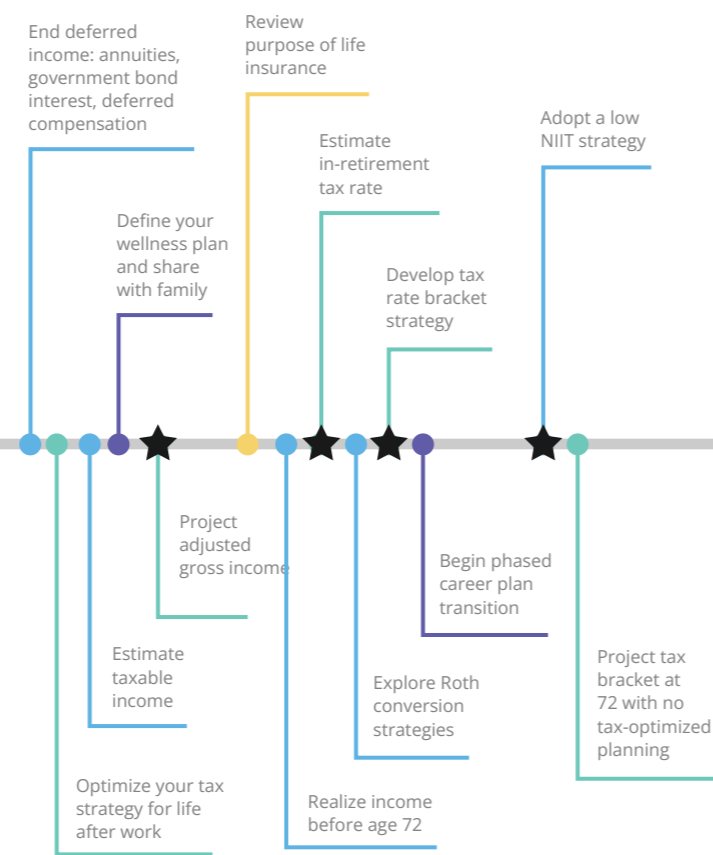
ACCUMULATION

Build a smart foundation for the future



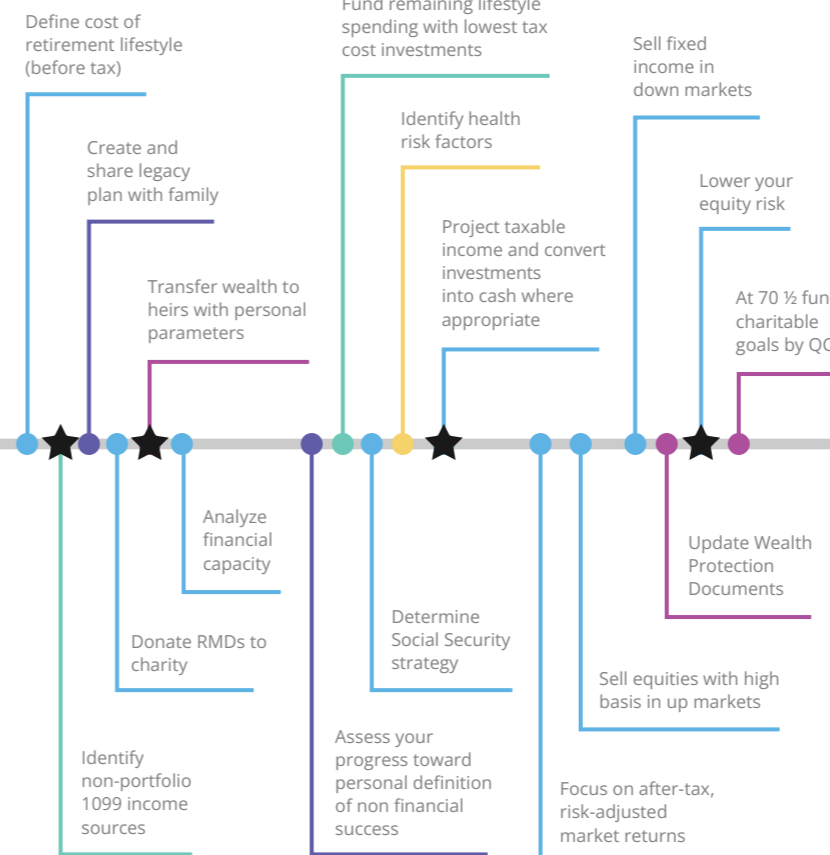
TRANSITION

Preserve your wealth while paying taxes



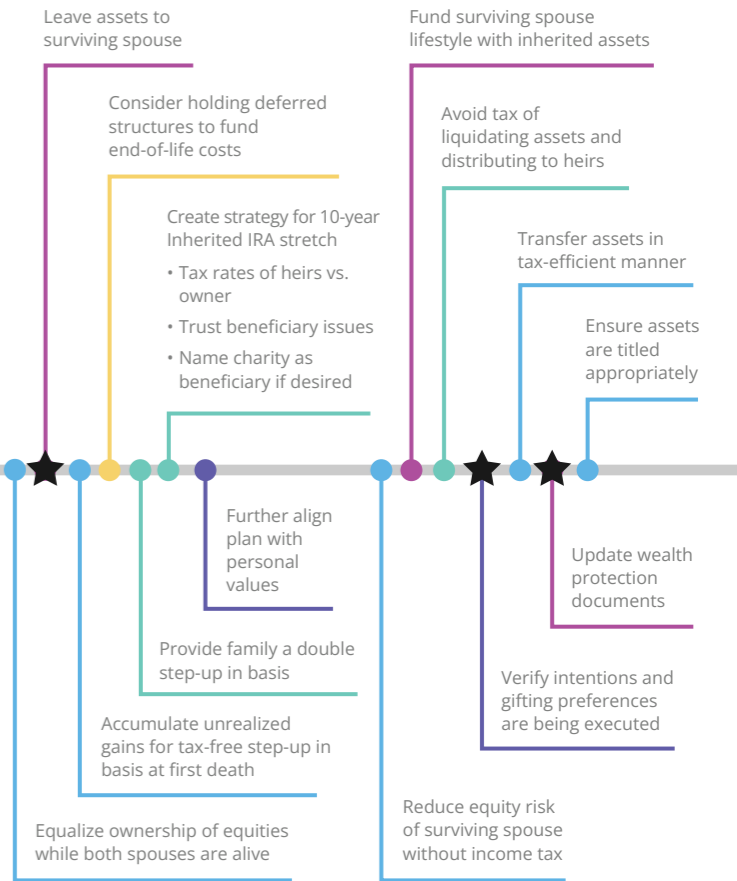
DISTRIBUTION

Fund and maintain lifestyle



LEGACY

Plan for your heirs and charitable causes



Design | Build | Protect®

Strategies for Retirement Transitions

When you design a plan, it requires it requires an integrated approach across many life and financial areas. Key moments across each phase can impact a client's long-term success — several of which present opportunities for professionals to work together. This approach can enhance the client experience while potentially delivering better outcomes.

- Life & Health
- Investment
- Tax
- Estate
- Risk
- ★ Collaboration Moments

