GOVERNMENT EMPLOYEE
WEALTH ADVISORS

SELF DIRECTED BROKERAGE ACCOUNT ROADMAP TO MAXIMIZE THE RESULTS OF YOUR TAX DEFERRED RETIREMENT SAVINGS PROGRAM

DISCOVERY

- Your Goals, Needs and Concerns
- What Are Your Objectives?
- Do You Need More (savings/return)?

EXPLORE

- What Tools Are Available to You?
- Which Options Are Best for You?
- How Does it all Fit Together?
- How Does It Work?
- Is It Better?
- Is It Right for Me?

IMPLEMENT

- Already Available In Your Plan
- Easy to Set Up
- Still Get Your Same Statements
- Not a Taxable Event
- Not a Rollover

REVIEW

- Returns Matter
- Stop Loss Risk Mgmt
- Portfolio Re-balancing
- Weekly Market Updates
- Do you Need a Retirement Plan?