

# Retirement Education Center

|                        |                           |             |                            |                    |
|------------------------|---------------------------|-------------|----------------------------|--------------------|
| Social Security Tax    | 401K                      | 4% Rule     | CARES ACT Distribution     | Pro Rata           |
| IRA                    | Asset Allocation          | SSDI        | Maximizing Social Security | SECURE ACT         |
| 457B                   | Cost of Living Adjustment | <b>FREE</b> | Annuity                    | Financial Literacy |
| Roth IRA               | Gov't Pension Offset      | Pension     | Rule of 55                 | Compound Interest  |
| CARES ACT Distribution | Inflation                 | 457B        | Long Term Care             | 403B               |

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|                       |                              |                          |                                 |                                  |
|-----------------------|------------------------------|--------------------------|---------------------------------|----------------------------------|
| SECURE<br>ACT         | 457B                         | Roth 5<br>Year<br>Rule   | Cost of<br>Living<br>Adjustment | 457B                             |
| Financial<br>Literacy | SSDI                         | 401K                     | Social<br>Security<br>Tax       | Maximizing<br>Social<br>Security |
| Pro<br>Rata           | Inflation                    | <b>FREE</b>              | 403B                            | Long<br>Term<br>Care             |
| Asset<br>Allocation   | CARES<br>ACT<br>Distribution | Mega<br>Roth<br>Backdoor | Whole/Term<br>Life<br>Insurance | Roth<br>IRA                      |
| Annuity               | Pension                      | 4% Rule                  | IRA                             | Simple<br>Interest               |

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|                        |                                |                           |                        |                     |
|------------------------|--------------------------------|---------------------------|------------------------|---------------------|
| 457B                   | Windfall Elimination Provision | Whole/Term Life Insurance | Asset Allocation       | 403B                |
| Roth 5 Year Rule       | Maximizing Social Security     | Bull/Bear Market          | 401K                   | Social Security Tax |
| IRA                    | Annuity                        | <b>FREE</b>               | Pro Rata               | Financial Literacy  |
| CARES ACT Distribution | Long Term Care                 | Cost of Living Adjustment | CARES ACT Distribution | Pension             |
| Simple Interest        | Asset Allocation               | Roth IRA                  | Gov't Pension Offset   | 4% Rule             |