

Retirement Planning Essentials Webinar Series:

- *Retirement Income Planning: 401k vs. IRA Rollover Pros and Cons
- *Healthcare: The Retirement Wild Card (Medicare and Healthcare in Retirement)
- *Maximizing Your Social Security Retirement Benefits

Join speaker, Andrew Hergert, Financial Advisor with Raymond James Financial Services, Inc. for this comprehensive series of retirement webinars:

***All webinars will be held live from 11:15AM-12:00PM**

*Please email Andrew.hergert@raymondjames.com if there are issues with the webinar links or if you have questions.

5/2/24 Topic 1: Retirement Income Planning: 401k vs. IRA Rollover Pros and Cons

Click on this link to view the presentation (it will only work at time of webinar): [Click Here](#)

- Pros and Cons of 401k vs IRA rollover options
- Avoiding income planning mistakes in retirement (including pension decisions)
- Investment strategies to generate growth and income in retirement

5/9/24 Topic 2: Healthcare: The Retirement Wild Card

Click on this link to view the presentation (it will only work at time of webinar): [Click Here](#)

- Discussion of Medicare and Medigap coverage
- Estimate and account for major healthcare expenses
- Assess the impact on your retirement income and determine how costs will be met

5/16/24 Topic 3: Maximizing Your Social Security Retirement Benefits

Click on this link to view the presentation (it will only work at time of webinar): [Click Here](#)

- Discussion of rules and claiming strategies
- Review of Social Security basics
- Spousal benefits and case study examples