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New career questions for your financial professional

Making a big change in your life triggers some big questions. A financial professional can help you work through the answers.

Print this list and have it handy when you're ready to start the conversation.

- What is the best way to manage my money during a career transition?
- Should I adjust my investment strategy with this career change?
- Will a change in employee benefits impact my long-term goals?
- How do I continue making regular contributions toward my retirement?

New career questions for your financial professional

- How do prospective retirement savings options compare to those at my current job?

- Should I maintain both a 401(k) and IRA (individual retirement account)?

- Should I roll over assets into a Roth or traditional IRA?