MIDWEST CAPITAL
ADVISORS™

Partnering. Educating.
Making the Difference.

Individual Meetings with Midwest Capital Advisors

Our individual meetings are an opportunity for you to speak with an MCA Advisor in a private setting. Whether you are at the beginning stages of your career or the transition to retirement is imminent, we are a resource for you and welcome the opportunity to connect.

Common Topics for Discussion

- Your Retirement Plan
  - Explanation of benefits
  - How the Retirement Plan fits into your personal retirement picture
- Investing in your Retirement Plan
  - Review of current investments
  - Explanation of your options
  - MCA Investment Risk Questionnaire
  - Guidance on making an informed investment decision
- Saving in your Retirement Plan
  - Employer contributions
  - Roth (after-tax) vs. Traditional (pre-tax) considerations
  - Steps to improve savings rates
- Your Personal Retirement Picture
  - Online planning tools
  - General investing and savings considerations
- Transition into Retirement
  - Rules on distributions
  - Options for your Retirement Plan at retirement
  - MCA Retirement Goal Planning with MoneyGuidePro™
  - Social Security
- Other Personal Finance
  - While our focus is on preparing for retirement, often we can provide tips on debt reduction, college planning, budgeting, and other personal finance topics.

Meetings are scheduled in 30 minute increments. Depending on the nature of your questions, multiple meetings may be necessary.

Be sure to bring your username and password for the Retirement Plan website with you to the meeting

P 616.454.9600 ♦ info@midwestcap.com ♦ www.midwestcap.com