

Points of Interest

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Age 50: bWfeUge Feh]fea ebhGUj]bgg
 GUfh]bg]b 200 50 500

Age 55: DebU'mh: fee (O1f]_Lncbe
 Znci feh]fe UhUge 55cf c`XefZnci Wb dchebh]U'm
 HU_e X]grf]Vi h]cbgZfca nci f (O1f]_Lch]ef
 ea d`cnef!gcbgcfex feh]fea ebhUbk]h]ci h
]bWff]bg debU'h]eg' Mci Wb Uj c]X
 H]ei gi U' 1Q ZeXefU HUI debU'h]mcb eUf'm
 k]h]XfUk UgZVi hbche h]Uhnci ``gh`` ck e]bW]a e
 HUI egcb h]ege X]grf]Vi h]cbg'

Age 59 1/2: DebU'mh: fee Qualified Retirement
 Accounts one
 nce ou itt is alf irt da ou ma ta e
 it dra als from Qualified Retirement Accounts
 it out ettin enali ed raditional account
 it dra als are ta ed as income Rot
 distri utions are ta free and enalty free if any
 Rot account as een eld for at least fi e years

Age 62: GcV]U GeWf]m9]g]V]]m6eg]bg
 AhUge 62Znci a UmVe e`]g]V'e hc feV]j e GcV]U
 GeWf]mVebeZ]hg' ?eed]b a]bXZ\ck ej efZ]h Uh]Z
 nci ghUfh]U_]bg VebeZ]hg Uh]h]gUgeZnci f VebeZ]hg
 Ufe feXi V]X Vm]U Z]UM]cb cZU defV]bhZcf eUW
 a cbh VeZcf nci f Z ``feh]fea ebhUge fk \]W
 j Uf]egXedebX]bg cb nci f V]fh] n]eUf]e'

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Age 65: Medicare Eligibility Begins
 As you may know, Medicare is federal health insurance for people 65 or older and for those under 65 with certain disabilities. Starting three months before your 65th birthday until three months after you turn 65, you can sign up for Medicare benefits. Or, if you're already receiving Social Security benefits, in most cases you'll be automatically enrolled in Medicare. You can learn more by visiting Medicare's website at:

www.medicare.gov/eligibilitypremiumcalc/

Age 70: Maximum Social Security Benefits Begin
 If you delay claiming Social Security benefits, you may be eligible for increased payments. After age 70, however, there is no additional incentive for delaying benefits.

Age 70 1/2 or 72: Required Minimum Distributions
 At this age, you must start taking your annual required minimum distributions (RMDs) from retirement accounts, such as a traditional IRA. Take note that RMDs are taxed as ordinary income. If you were at least 70 1/2 on December 31, 2019, you must begin taking RMDs at age 70 1/2; otherwise, you must begin taking RMDs at age 72.



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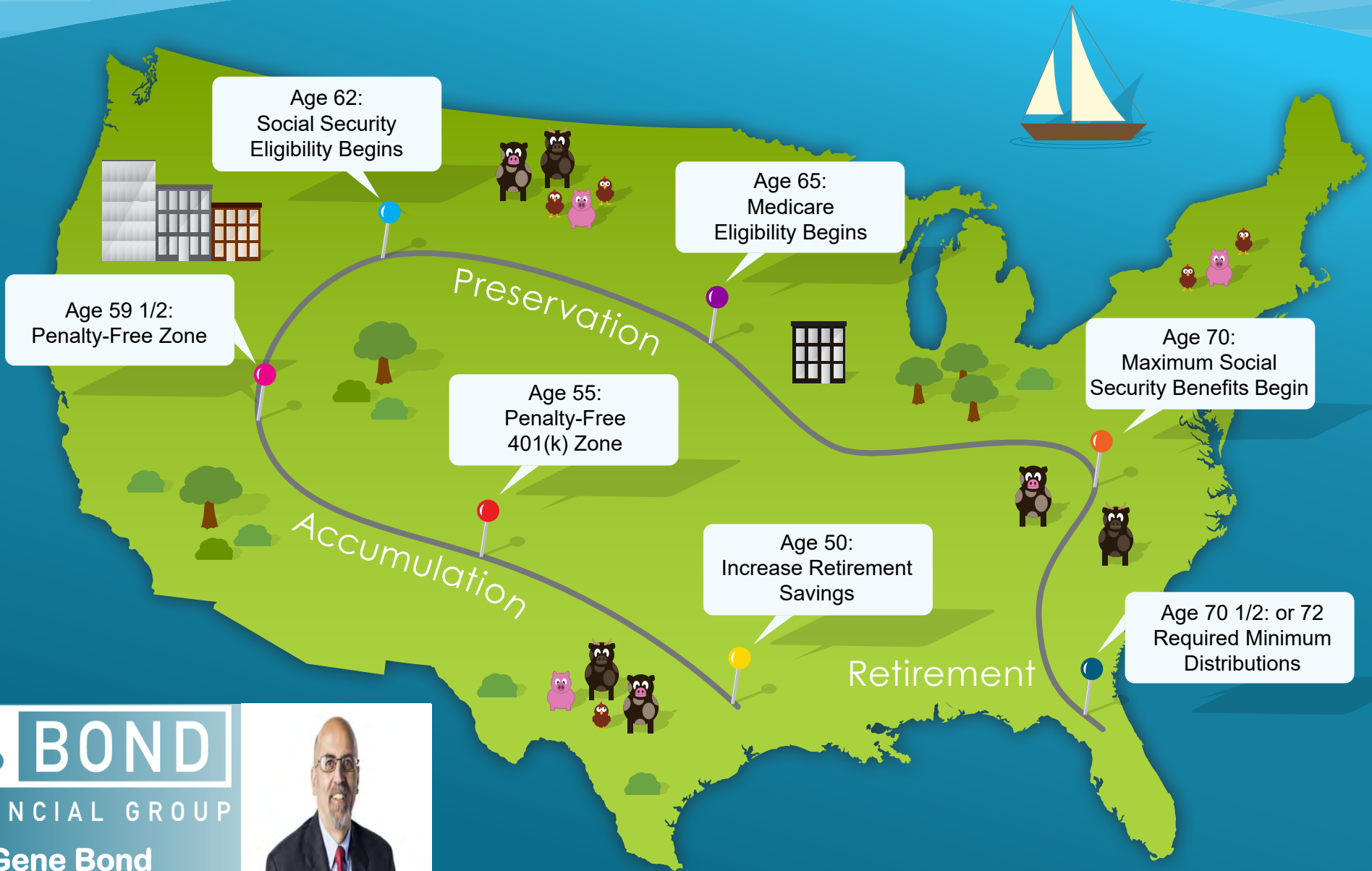
Retirement Roadmap

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Retirement Roadmap



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Gene Bond
President

