

# JACKSON COUNTY *Employee* INVESTMENT PROGRAMS



As an Accredited Investment Fiduciary (AIF),  
my role is to ensure all employees have access to cost-efficient and goal-based investment opportunities.

## AVAILABLE EMPLOYEE PROGRAMS:

### 1. Payroll Deducted Roth IRA

- One of the lowest-cost Roth IRA programs available.
- Your contributions grow tax-free for retirement.
- More of your money stays in your account.

*Note: Roth IRA withdrawals prior to age 59½, or before the account has been open for 5 years, may result in a 10% IRS tax penalty.*

### 2. 529 College Savings Plan

- Sales charge reduced from 3.5% to 2.5%.
- The State of Illinois will now seed your child's account with \$50.
- Allows for Roth rollovers after the account has been open for 15 years.

**THESE ARE EXCELLENT REASONS TO TAKE PART  
AND START PLANNING FOR YOUR FAMILY'S FUTURE TODAY.**

#### Additional Services Offered:

- 401(k) Rollovers
- Wealth Management Strategies
- Life Insurance Reviews
- Financial Planning



**BEGIN PLANNING WITH CONFIDENCE.**



#### CONTACT:

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