

# Retirement Planning Support from Customer Concierge

According to the Bureau of Labor Statistics, people will hold an average of 12.3 jobs in their lifetime.\* This, along with other life events such as retirement and job terminations, can make it easy for people to fall off course, losing sight of the importance of saving for retirement. OneAmerica® is here to help.

## Interim planning *Transition support*

Our Customer Concierge Service Team is staffed with professionals dedicated to educating you on the benefits and considerations of each option for your retirement account. You may be contacted directly by a member of the team, or you can call or email to have a consultative discussion to determine the right solution for you. We may discuss the options below.

- Keeping assets in your former employer's plan
- Rolling to a traditional IRA
- Selecting a retirement income stream through the purchase of an annuity
- Transferring assets to a new employer's plan
- Receiving a lump sum cash withdrawal

\*Number of Jobs Held, Labor Market Experience, and Earnings Growth among the Youngest Baby Boomers: Results from a Longitudinal Survey, Bureau of Labor Statistics, August 2019.

## Long-term planning

### *Retirement income assistance*

In addition to education on retirement account distribution options, select career agents may be able to help with personalized, long-term financial planning. You have an option to be put in contact with a retirement income professional who can provide customized financial planning assistance which may include retirement education, social security and healthcare costs personalized to your expected retirement age, goals, health and lifestyle.

To speak with a member of the Customer Concierge Service team, call **1-800-858-3829** or email us at [NextSteps@oneamerica.com](mailto:NextSteps@oneamerica.com).

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