Talk With a Financial Planner

Get complimentary financial guidance from MissionSquare Retirement Certified Financial Planner™ professionals.

Financial planning services include:

- Consultations with a CFP® professional now and through retirement.
- Social Security analysis with strategies for taking this benefit.
- Webinars on investing, retirement planning, taxes, and more.

Additionally, participants with account balances of $50,000+ can receive a personalized financial plan.*

Schedule a consultation with a CFP® professional

www.missionsq.org/cfpschedule

Not ready to meet with a Certified Financial Planner™ professional?

To learn more, contact your Retirement Plans Specialist:

Keith Penewit
Retirement Plans Specialist
(202) 759-7015
kpenewit@missionsq.org

www.missionsq.org/appt-tacoma

Register for weekly educational webinars:

Gain helpful financial information on a range of topics such as investing, retirement planning, taxes, and more as you journey to and through retirement.

www.missionsq.org/cfpwebinars

Visit the Interactive Financial Wellness Center:

Get personalized recommendations and access educational content, including videos, calculators, games, and more.

www.missionsq.org/login

*A fee of up to $175 may be assessed for participants with account balances less than $50,000.

MissionSquare Retirement 777 N. Capitol Street, NE, Washington, DC 20002-4240
(800) 669-7400 **www.missionsq.org/tacoma**

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