Q2 24
Retirement Plan Services

Midland
Wealth Management

NAVIGATING CAREER TRANSITIONS

Life is full of changes, and your career journey is no exception. Whether you're switching jobs, facing a layoff, considering retirement, or dealing with unexpected challenges like disability, we provide the guidance and support you need to navigate these transitions confidently.

OUR SERVICES

Retirement Account Transition Assistance: Our team specializes in guiding you through the transition process. We offer tailored insights into retirement plan options, such as distributions or rollovers, to meet your needs.

Investment Services: Our group provides in-depth investment reviews to evaluate if your retirement account selections align with your financial goals.

Transition Paperwork Support: Dealing with paperwork during transitions can be overwhelming. Let us assist you in completing the necessary documents for account rollovers, distributions, or transfers between retirement accounts, providing an efficient process.

Life Vision Planning: Your career transition is an opportunity to reassess your financial plans. Collaborate with a Midland Wealth Advisor to create a personalized financial plan incorporating your career transition goals and retirement objectives.

At Midland, we're committed to empowering you to make confident and informed decisions about your retirement savings and financial future, regardless of the life event you may be experiencing. We understand that transitions can be challenging, but rest assured, we're here to support you every step of the way.

For personalized guidance and assistance, schedule a one-on-one consultation with Midland. Together, we'll navigate your career transition with expertise and care.

Questions or concerns? Please call Midland Retirement Plan Services at (815) 231-2816 to speak to your retirement specialist or e-mail us at retirement@midlandsb.com.