

# ZUK

## FINANCIAL GROUP

*THE EDUCATED CHOICE*



## Timely Preparation Can Help Put A Confident And Realistic Retirement Plan Within Your Reach

Talk to a professional from Zuk Financial to help you prepare a comprehensive retirement plan customized to your financial goals.

- All Investment account types including 403(B) Accounts & 457 Deferred Compensation Plans
- CalSTRS – CalPERS Retirement Income Projections
- Social Security – Windfall Elimination Provision
- Retirement Income Plans & Tax Return Analysis
- Roth Conversion Analysis
- Estate Plan & Beneficiary Review
- Insurance Review
- 529 Plans for College Planning

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