



Get Your Financial Life In Order!

We are pleased to introduce Lockton Retirement Services an Offering of Creative Planning, as the Agency's new investment advisor for our retirement plans.

Managing your finances can be confusing and difficult. That's why we are proud to offer this Financial Wellness program to our employees.

Bert Kingsley, from Lockton Retirement Services, is available to meet with employees who would like to review their account or who have other questions regarding their overall financial well-being. This service is included as part of your employee benefits plan, there is no cost to you.

Schedule your meeting with Bert today by emailing him at the address below!

BERT.KINGSLEY@CREATIVEPLANNING.COM

For all questions related to accessing your account, including password resets, please reach out to Shelly Duval at Shelly@FuturePlanningAssoc.com or (802)857-0686.

PRE-TAX OR ROTH?

HOW SHOULD I INVEST?

AM I SAVING ENOUGH?

HOW CAN I SAVE FOR MY
CHILDREN'S EDUCATION?
