

# Beyond the Basics: More Than Just 403(b)s/457(b)s

FOR ALL YOUR  
INVESTMENT  
NEEDS



Finding the resources and discipline to invest regularly for retirement is challenging for many people. Knowing how to invest your money may present an even bigger challenge. That's why we recommend seeking the advice of a financial professional.

A financial professional can help you lay the groundwork for a successful investment plan tailored to your financial goals, risk tolerance and time frame, as well as recommend appropriate investments that can help you reach your retirement savings goals.

## Your financial professional can provide presentations and advice on the following:

- » **Comprehensive Financial Planning**
  - Financial Counseling
  - Budgeting
- » **Retirement Planning**
  - 403(b) plans
  - 457(b) plans
  - Fixed and variable annuities
  - Income strategies
  - Roth & traditional IRAs
- » **Education Planning**
  - 529 plans
  - Coverdell Education Savings Accounts
  - UGMA/UTMA
  - Loan forgiveness
  - Loan repayment planning
- » **Asset Management Strategies**
  - Estate planning
  - Professional portfolio management
- » **Investments**
  - Mutual funds
  - Tax-deferred and tax-sheltered accounts
  - Non-qualified investments
- » **Insurance Planning**
  - Life
  - Long-term care
  - Disability
  - Generational planning
  - Pension maximization strategies

Wealth Planning Advisors  
Suite 200  
21800 Burbank Blvd  
Woodland Hills, CA 91367  
[www.lincolninvestment.com](http://www.lincolninvestment.com)

Advisory services offered through Capital Analysts or Lincoln Investment, Registered Investment Advisers.  
Securities offered through Lincoln Investment, Broker-Dealer, Member FINRA/SIPC. [www.lincolninvestment.com](http://www.lincolninvestment.com) Wealth Planning Advisors and the above firms are independent, and non affiliated.

**LINCOLN**  
INVESTMENT



**David Levine**  
*Financial Representative*  
(415) 450-6626

[dlevine@lincolninvestment.com](mailto:dlevine@lincolninvestment.com)