



The Retirement Revolution: A Strategic Guide to Understanding & Investing Lump-Sum Distributions from Qualified Retirement Plans

Dan Flores

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The Retirement Revolution is an invaluable resource for anyone who is retiring, losing a job or investing retirement assets. Dan Flores brings over twenty years of experience guiding clients' investments to this in-depth look at the needs of individuals receiving a lump-sum distribution from a qualified retirement plan. In clear and easy-to-understand language, Flores analyzes the lump-sum alternatives and investment strategies necessary to become an informed investor, including: The rules and regulations of lump-sum distributions and IRA rollovers. The penalties and pitfalls of early retirement and how to avoid them. The differences between asset allocation and diversification. How to build an investment portfolio blueprint and monitor accounts. Understanding the importance of product selection: the advantages and disadvantages of individual securities, money managers, and packaged products such as mutual funds, index funds, unit trusts, and exchange traded funds. Strategies for taking income out of retirement plans. The Retirement Revolution is an especially useful resource for benefits and human resource directors to share with employees.

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