

Celebrating Over 30 Years...

...and Supporting You for the Next 30

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Life Event Planning Checklist: Milestone Birthdays

- Age 50
 - Make catch-up contributions to IRA's or other qualified retirement plans
- Age 55
 - Take distributions from 401(k) plan without penalty if already retired
- Age 59 ½
 - Take IRA distributions without penalty
- Age 62
 - Apply for Social Security benefits
- Age 65
 - Apply for Medicare
- Age 70 ½
 - You must begin taking RMD's from you IRA's and/or employer retirement plan