



## Maryland Supplemental Retirement Plans

457(b)

Roth 457(b)

401(k)

Roth 401(k)

403(b)



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### Keith Beasley Retirement Specialist

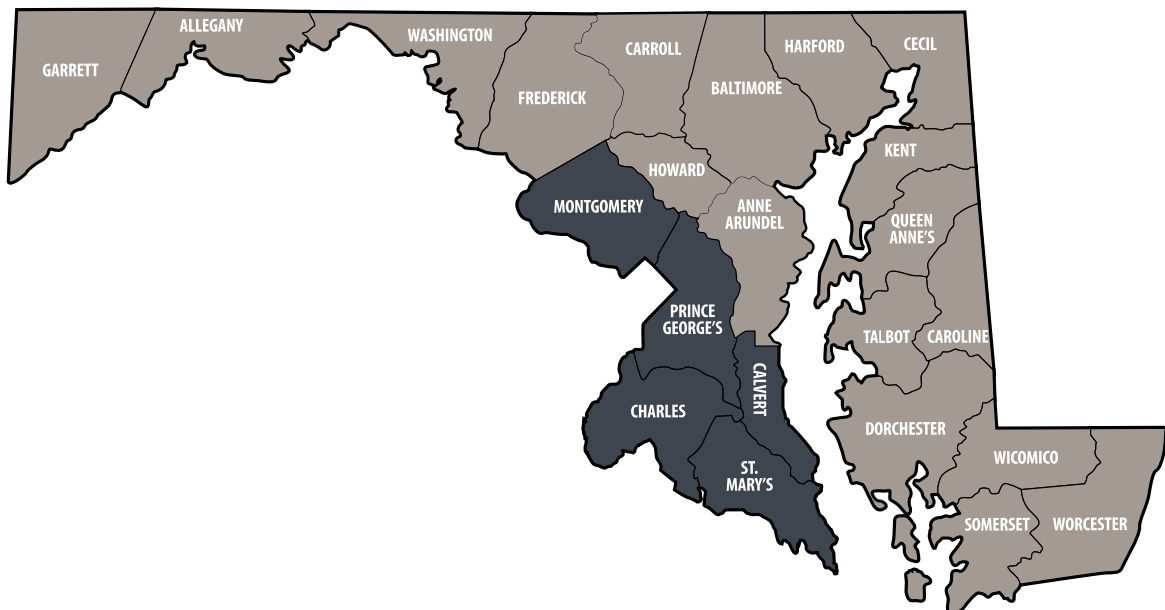


BOOK APPOINTMENT

Keith is dedicated to helping retirement plan participants in Eastern Maryland counties closest to Washington, DC. He has over 6 years experience specifically working with employer-based retirement plans offered by state and local governments for the benefit of their employees. Keith also leads a monthly coffee and chat that includes a book of the month discussion for members of his territory.

Keith is a licensed financial professional maintaining both the series 7 and 66 licenses as well as a life and health insurance license. He obtained a Bachelor of Arts degree in Finance from Morehouse College and a Certificate in Financial Planning from Georgetown University. Keith lives in Washington, DC and enjoys spending time with family, friends and the family dog, Marley.

*Keith is available to Maryland employees for a personal consultation (in person or by phone) as you plan for retirement.*



*Information from Retirement Specialists is for educational purposes only and should not be considered investment advice.*

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## Meeting checklist

Get the most from today's session:

- Review contribution amount
- Review investment portfolio
- Discuss ABC options/ProAccount option
- Discuss outside investments
- Check beneficiaries
- Use My Interactive Retirement Planner<sup>SM</sup>
- Check pension estimate
- Locate website/customer service
- Follow-up items

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