

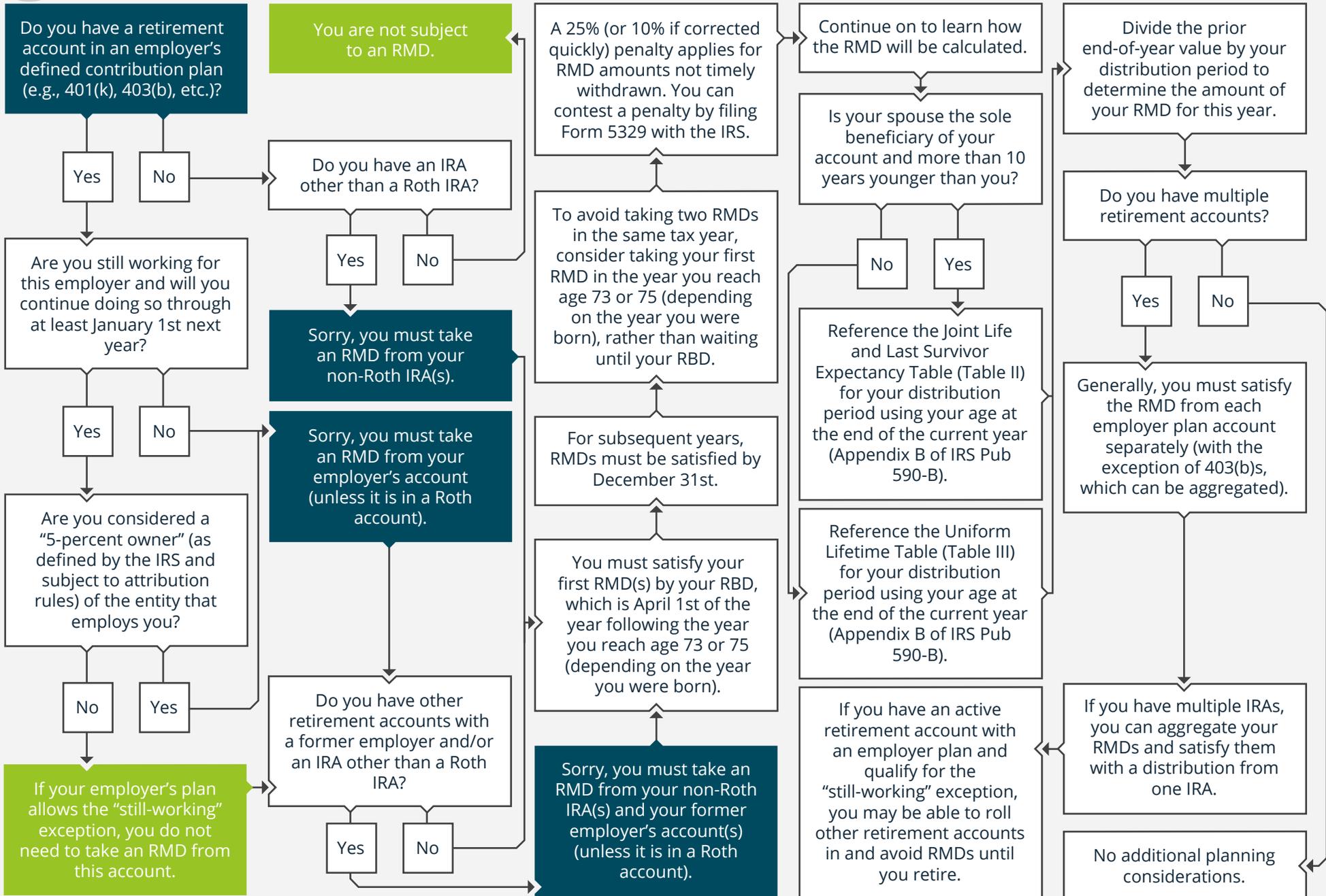
2024 · CAN I AVOID TAKING MY RMD AFTER REACHING MY REQUIRED BEGINNING DATE (RBD)?



TUSHINGHAM
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We accomplish this through our "Personal CFO" service which will help you proactively plan your financial affairs, obtain better outcomes, and live your ideal life.

Whether it's developing a retirement income strategy, minimizing taxes, or paying for college, we will be there to guide you. This will all be coordinated with a team of experienced professionals, from CPAs to attorneys, on a technology-driven platform.

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Brett Tushingham, Founder and Financial Advisor

900 Midnight Channel Road Wilmington, NC 28403
info@tushinghamwealth.com | 866-505-9016 | www.tushinghamwealth.com