

MEMBERS IN TRANSITION WEBINAR

MIT: RETIREMENT PLAN OPTIONS WHEN YOU LEAVE YOUR EMPLOYER



Keri Vaught
Financial Advisor

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Online Via GoToWebinar
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MiT: Retirement Plan Options When You Leave An Employer

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Abstract:

Sure, it's not your first thought when you leave an employer but it's an important one – What happens to the retirement assets you have built up in your previous company's retirement plan when you leave? What happens to the company stock you left there? Depending on your situation and/or the retirement plans details, there are essentially 4 options. I will go through each of the options and the implications of each. We will also discuss the pros and cons of each option, along with some current legislation that could affect your decision.

Bio:

Keri Vaught is a licensed Financial Advisor. Finance and all things money intrigued her, even as a child – how to control it, rather than having it control her. After seeing times of prosperity and times of struggle for those she loved most, and it was apparent who planned and who did not. Wanting to help is what led Keri to her career as a financial advisor.

After receiving her bachelor's degree from Texas A&M University in 2013 (Whoop!), she married her husband and moved to Midland, TX in 2014. This has been her home ever since. Keri and her husband, Tyler, are proud foster parents and are passionate about helping the children in their community.

It is very important to Keri to serve her community and she is involved in many local organizations including Midland Chamber of Commerce, Junior League of Midland, Midland A&M Club, Uptown BPW, Midland Rotary West, and her local church. She enjoys the outdoors with her dogs, reading, and anything social.