Bull Financial 401(k) Program Guide

Will You Have Sufficient Funds for Retirement?

Managing your retirement account can be complex, and making poor investment choices now could lead to a smaller nest egg when you retire.

Bull Financial's 401(k) program assists you in customizing your 401(k), 403(b), or 457 by recommending what to buy, when to buy, and when to sell.

Maximize your retirement savings for your future. Receive ongoing guidance directly to your email and with text notifications to make more informed decisions about your retirement account.

bull.financial

info@bull.financial

Your retirement account can be one of your most significant assets.

Unfortunately, many people don't actively manage their accounts. Bull Financial's 401(k) Program can guide your investment decisions and help you prepare for the future.

Bull Financial's 401(k) Program is designed to help you manage your company-sponsored retirement plan investments. It provides personalized allocation recommendations based on your risk tolerance and long-term goals. The system generates portfolio allocation suggestions and advises on changes to your investment strategy considering your plan's investment options and market fluctuations.

Recommended allocations will be based on your plan's:

- **Asset Classes**
- **Fund Managers**
- **Fund Performance**
- **Asset Turnover and**
- **Current Market Conditions**

Benefits of Bull Financial's 401(k) program:

- **Detailed instructions and updates delivered directly to your email and phone notifications.**
- **Continuous guidance.**
- **Informed stock option recommendations.**
- **Fixed, money market, and cash recommendations during market downturns**

bull.financial

info@bull.financial

Bull Financial's 401(k) Program Defensive Strategy

Bull Financial's 401(k) program receives defensive strategy signals from market analysts. This additional layer of security alerts you when conditions suggest a possible downturn, helping you possibly stay on the right side of the market.

This method removes emotion and guesswork from your investment decisions, aiming to keep client portfolios more secure by signaling when to move investments to cash or less risky options.

bull.financial

info@bull.financial

Start managing your retirement in just 2 simple steps:

Schedule a brief 15-minute call with Bull Financial to discuss your retirement plan options and program details.

We will assess your investment risk level with our quick risk tolerance questionnaire to determine your comfort level with risk, based on your financial goals and investment timeline.

Rebalance and reallocate. You will be notified when your allocations are ready. Log in to your financial institution to make any allocation changes based on our recommendations.

Personalize your 401(k), 403(b), or 457 with Bull Financials 401(k) program to help achieve your retirement goals. Schedule your call today.