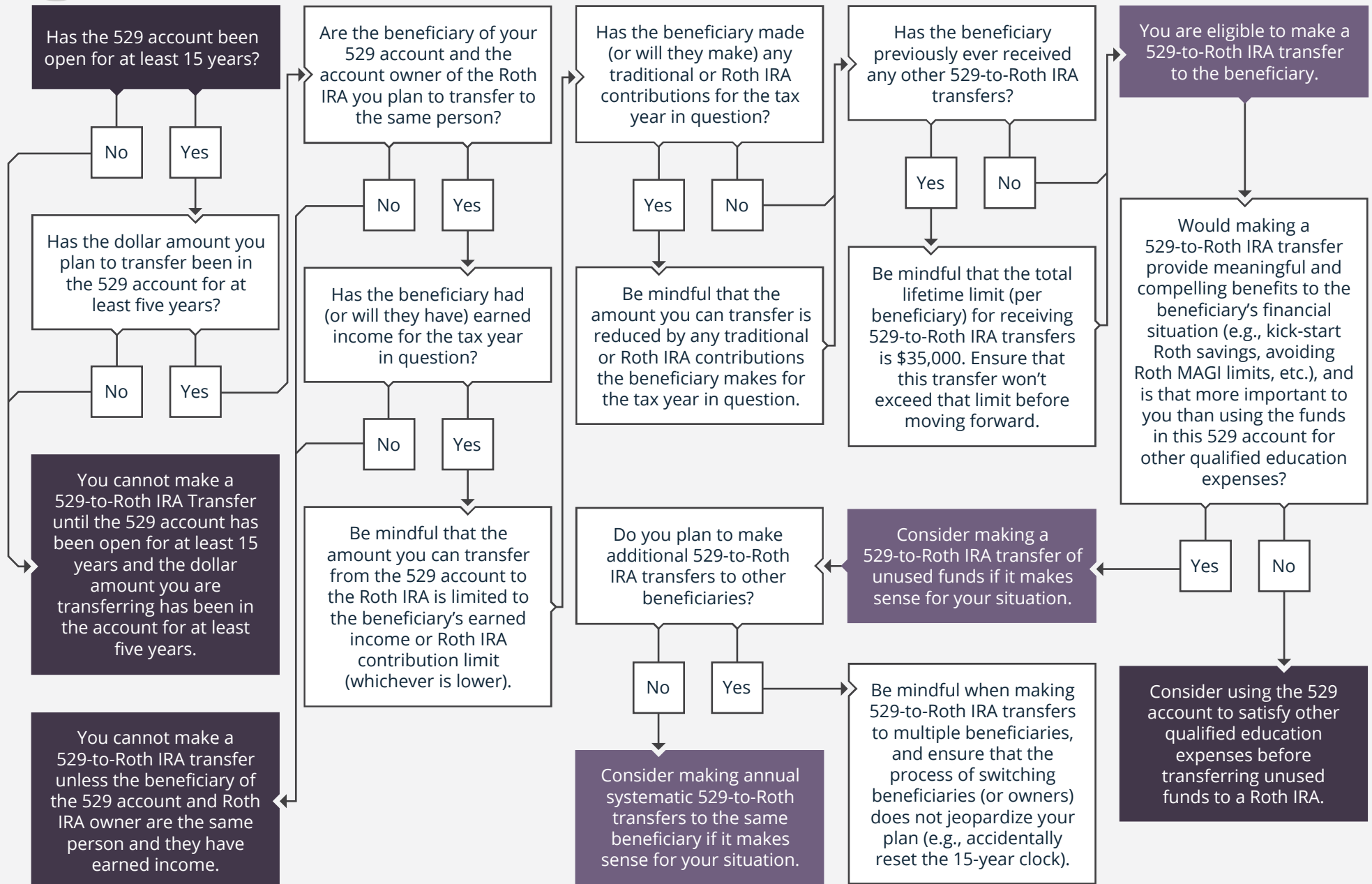


2024 · CAN I MAKE A 529-TO-ROTH IRA TRANSFER?

 Start Here



Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with plaque design) logo in the United States, which it authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Prism Planning and Solutions Group, LLC (Prism) is a dba of Insight Advisors, a Registered Investment Adviser. Advisory services are only offered to clients or prospective clients where Insight Advisors and its representatives are properly licensed or exempt from licensure. This material is solely for informational purposes. Past performance is no guarantee of future returns. Investing involves risk and possible loss of principal capital. No advice may be rendered by Insight Advisors unless a client service agreement is in place.

Prism is providing this flowchart for informational purposes only from sources believed to be reliable, but cannot make any guarantees as to its completeness, accuracy or timeliness.

Julia Peloso-Barnes, CFP, CEO/Sr. Wealth Manager

Prism Planning and Solutions Group, LLC 777 Westchester Ave, Suite 101 White Plains, NY 10604
Julia@PPSgrp.com | +1 (914) 831-3050 | www.PPSgrp.com