



Retirement Point

Updates and insights on 401(k) plans & plan education



Get the Most Out of Your 401(k)



Are you making the most of your 401(k)? From contribution strategies to investment options, explore essential tactics for optimizing your retirement plan to benefit both your future and your business's financial health. Plus, find important considerations for plan participants regarding eligibility, tax strategies, and more.

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Your 401(k) Transition — What to Expect

Our streamlined 401(k) transition process guides you through every step — from initial setup to ongoing support. View our Q&A piece for a clear look at what to expect at each stage of your 401(k) transition.

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Our Professionals Share Expertise in the Community

[Jon Marquet](#), JD, and Allyson Krause, CRPP™, shared insights on Holistic Investing and Financial Planning at the Minnesota Veterinary Medical Association's annual conference earlier this year. Catch them next at the MN Conference on Architecture on November 11th.

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Allyson Krause Awarded as 2024 Rising Star

Congrats to Our Rising Star Under 40 Honoree!



We're proud to announce that our Managing Director of Retirement Plan Services, [Allyson Krause](#), CRPP™, has been recognized as a *2024 Rising Star Under 40* by the 7 Rivers Alliance and River Valley Media Group. This award honors exceptional young leaders across the La Crosse region who are making a positive impact in their communities.

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If you have questions about your 401(k) plan, please contact the Trust Point Retirement Plan Services Team at 800-458-9111 or email retirementplanservices@trustpointinc.com.

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