2023 · CAN I MAKE A MEGA BACKDOOR ROTH CONTRIBUTION?

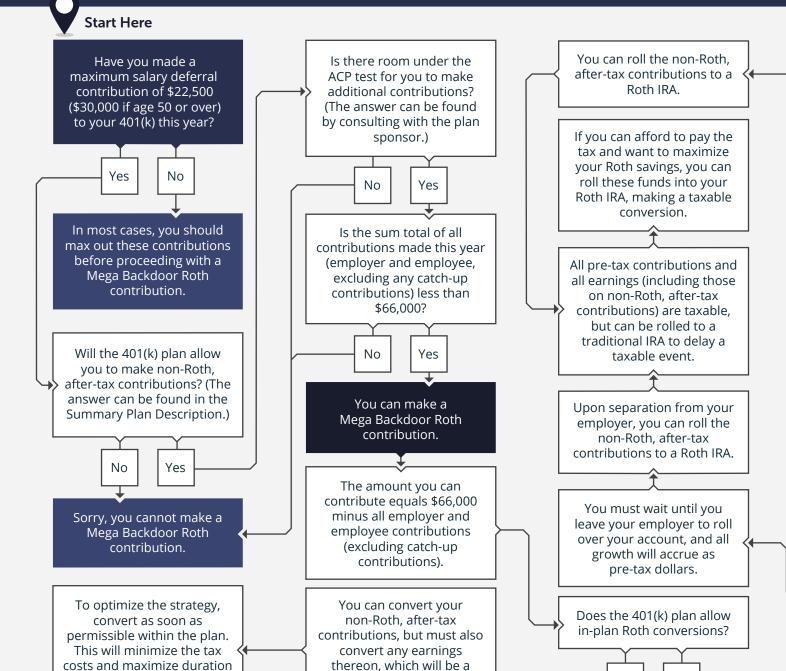


All distributions from your

account must be funded

and after-tax dollars, per

proportionately with pre-tax



taxable conversion.

of favorable Roth treatment.

the Pro Rata Rule.

This feature will allow you to roll over only your after-tax subaccount, and you can manage your pre-tax subaccount separately.

Yes

No

Does the 401(k) plan maintain separate subaccounts for pre-tax and after-tax contributions?

No

Yes

Does the 401(k) plan allow for in-service (nonhardship) distributions?

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Yes

No



We help you make smart decisions about money

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Angela Johnson, CERTIFIED FINANCIAL PLANNER™

104 Melody Lane Friendswood, TX 77546 support@worthenadvisors.com | 832-895-1188 | WorthenAdvisors.com