



Lord Abbett strives to make it easy for you to save for retirement with your IRA—whether you're looking to consolidate assets,* manage retirement income, or open an account. We are committed to providing you and your financial advisor with the highest level of service.

LORD ABBETT IRA FEATURES INCLUDE:

EASY ON YOUR WALLET



- No annual custodial fees[†]
- No account setup charges
- No charges for paper statements
- Free overnight shipping[†]

FAST ACCOUNT SETUP



- Same day setup using Automatic Clearinghouse (ACH)
- Federal tax refunds direct deposited to IRAs

SIMPLE INVESTMENT SELECTION



- More than 30 equity, fixed-income, and asset-allocation capabilities to help address a range of investment goals
- Single fund allocation strategies

OUTSTANDING CLIENT SERVICE



- Website features mobile account access
- Extensive tools and resources to manage your IRA

DID YOU KNOW?

- Everyone can contribute to an IRA as long as they have earned (reportable) income.
- You can contribute to both your employer-sponsored retirement plan (401(k), 403(b), SIMPLE IRA, etc.) and an IRA.
- A nonworking spouse may be eligible to make an IRA contribution.
- You are eligible to roll over your assets from a former employer-sponsored retirement plan into an IRA.
- You can contribute to an IRA for the prior tax year until April 15 of the present year.

Contact your financial advisor to discuss these strategies and others you can use to help achieve your retirement savings goals.

* Consolidating assets may result in the assessment of transaction costs, charges, and/or fees.

[†] Lord Abbett will waive (or otherwise pay) the yearly \$10.00 custodial fee that would be charged each year on an ongoing basis to every new IRA account and therefore, will not assess a custodial account fee. Fund level fees and expenses are still applicable.



LORD ABBETT®

We aspire to be the most respected asset manager in the world, admired for our people, our performance, our relationships, and our organizational agility.

The information presented in this section is intended for general information and is not intended to be relied upon and should not be relied upon, as financial, legal, or tax advice for any investor. We strongly recommend that you contact your financial, legal, or tax advisor regarding your tax situation.

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FOR MORE INFORMATION:

Lord Abbett Client Service: 888-522-2388 | Visit us at lordabbett.com

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