

RETIREMENT INCOME PLANNING SERVICES

A New Resource for Your Retirement Strategy

June 4, 2026

Dear Valued Client,

At Tyler Insurance Group, our relationship with you has always centered on helping you make informed decisions during retirement. As part of that continued commitment, we are pleased to introduce access to annuity education and review services through Helen McDonnell, Financial Services Specialist.

Annuities can be useful for certain retirement goals, including creating predictable income and reducing exposure to market uncertainty. A personal conversation can help determine whether an annuity strategy is appropriate for your objectives, timeline, and existing savings.



Topics Helen Can Help You Explore



Options designed to protect principal from market loss, subject to contract terms



Strategies for guaranteed lifetime income through an issuing insurance company



Tax-deferred accumulation and retirement income planning considerations



Meet Helen

Helen McDonnell

Financial Services Specialist

A straightforward, client-centered resource to help you evaluate retirement income options.



Schedule an appointment



Call or text: **702-326-4921**



Annuities@TylerInsuranceGroup.com



Schedule a Personal Review With Helen

To begin the conversation, call or text **702-326-4921**
or email **Annuities@TylerInsuranceGroup.com**.

SCHEDULE A REVIEW

Annuities are insurance products and are not appropriate for every individual. Guarantees are subject to the terms of the contract and the financial strength and claims-paying ability of the issuing insurer. Withdrawals may be subject to surrender charges and tax consequences. Tyler Insurance Group does not provide tax or legal advice. Please consult your tax or legal advisor regarding your individual circumstances.