

RETIREMENT ALERT

Your Forgotten 401(k) Is COSTING YOU.

Millions of people have left retirement funds behind. They're sitting idle, collecting fees, growing for someone else's bottom line. Is yours one of them?

31.9M+

**DORMANT 401(K)
ACCOUNTS IN THE U.S.**

Source: Capitalize/Fidelity, July 2025

\$2.1T

**TOTAL FORGOTTEN
RETIREMENT ASSETS**

Source: Capitalize/Fidelity, July 2025

~\$67K

**AVERAGE BALANCE LEFT
BEHIND**

Source: Capitalize 2025 (DOL Form 5500)

WHAT'S HAPPENING TO YOUR FORGOTTEN 401(K)?

- Silent fees are draining your balance every single month, even while you sleep
- Your investments may be misallocated and outdated, costing you years of growth
- Your former employer could cash it out, triggering taxes and penalties you never saw coming
- You may be missing an account you don't even know exists from a job years ago

One South Carolina resident recovered over \$763,000 in unclaimed assets belonging to a deceased parent. Unclaimed money doesn't disappear, it waits for someone to find it.

Make sure your 401(k) isn't overlooked, Let's Chat:

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True North
— ADVISORS —

DATA SOURCES - 31.9M accounts & \$2.1T: Capitalize "The True Cost of Forgotten 401(k) Accounts," July 2025, cited by Fidelity.com. ~\$67K avg balance: Capitalize 2025 analysis of U.S. DOL Form 5500 data. SC \$763,000 example: State Treasurer of South Carolina via Moneywise.com, Feb 2026. AARP independently cites DOL data as "just under \$70,000" (March 2026).