

Education Minnesota ESI's When Can I Afford to Retire?

For union members covered by a TRA defined benefit pension plan

Tues., May 18

Virtual session

6 – 7 p.m.

*For members serviced out of the
Education Minnesota – SW Metro Field Office*

TOPICS TO BE DISCUSSED:

Pension education

- Learn how benefits are calculated
- Understand defined benefit pension plans

Financial planning

- What can you expect from Social Security?
- Tax-deferred and tax-free savings
- Asset allocation and asset management / diversification / performance and fees
- 403(b) match and severance payment options



Presented by: EFS Advisors

[Click here to register](#)

A Zoom link will be emailed to you the day before the session

If you are unable to join the virtual session and would like to meet with a financial advisor please contact Deborah Skog at 651-292-4856 or Deborah.skog@edmn.org.

Your request will be sent to a financial advisor in your area.

41 Sherburne Ave., St. Paul, MN 55103
651-292-4856 800-642-4624 Fax 651-292-4815

esi.educationminnesota.org

Securities offered through Advanced Advisor Group, Member FINRA & SIPC
Investment Advisory Services offered through Educators Financial Services, A Registered Investment Advisor.
1995 E Rum River Drive S., Cambridge, MN 55008 (877) 403-2374
Advanced Advisor Group and Educators Financial Services are affiliates under common control D/B/A EFS Advisors and are not affiliated with Education Minnesota/ESI

Paid for by ESI, not by dues. ESI is self-supporting; revenues provide benefits, service and consumer education for members.



ESI
Member Benefits