

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

*For union members covered by a TRA defined benefit pension plan*

**Thurs., Feb. 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](mailto:Deborah.skog@edmn.org).

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

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Member Benefits