



# Pension Division

Pension Partners

Helping You Plan, Prepare, Prosper



## Finance Workshops and Individual Consultations

Dates	Wednesday, April 25, 2012	Thursday, May 3, 2012
<b>Location</b>	City Hall Sister Cities 1103 301 King Street  Room may be chilly	City Hall Sister Cities 1101 301 King Street  Room may be chilly
<b>Topics and Times</b>	<p style="text-align: center;"><b>Individual Consultation with ICMA-RC Financial Planner <u>Steve Taylor</u></b></p> <p>30 minutes sessions 8 a.m. – 5pm</p> <p>You may discuss any personal financial planning topic including: saving for retirement, insurance needs, college funding, managing your retirement income, your estate plan, etc.</p> <p>The counselor may better understand your financial circumstance if you bring a summary of: your savings, pension, home mortgage, taxes, spouse's earnings and pension information, and your family budget sheet and any debt you have. You might want to bring any current pension and 457 plan statements you have. <i>Spouses are welcome to attend.</i></p> <p><b><i>RSVP Required. If possible, provide two times you are available</i></b></p>	<p style="text-align: center;"><b>ICMA-RC Information Session and <u>Finance Workshops</u></b></p> <p><b>Session 1:           9:00 – 10:15 a.m.</b> <u>No RSVP Required</u></p> <p>Information session on 457, Payroll Deduct IRA, and the Guaranteed Lifetime Income Fund</p> <p>Presenter: Gloria Moody, ICMA-RC</p> <p><b>Session 2:           10:30 – 11:45 a.m.</b> <u>RSVP Required</u></p> <p>Making Investment Decisions</p> <p>Presenter: Steve Taylor, ICMA-RC</p> <p><b>Session 3:           2:00 – 3:15 p.m.</b> <u>RSVP Required</u></p> <p>Estate Planning</p> <p>Presenter: Steve Taylor, ICMA-RC</p> <p>Employee may attend one or more sessions on this day.</p>
<b>To RSVP</b>	Email pensions@alexandriava.gov for 1) an Individual Consultation or 2) to attend Session 2 or Session 3. Please put Finance Workshops in subject line.	

***Be sure to obtain advance approval from your supervisor if you plan to attend a seminar during your scheduled work hours.***