



Union Education Trust

Shaping Your Future

Union Education Trust Presents.. Pre-Retirement Training

If you are a Active OCSEA State of Ohio Bargaining Unit member and close to retirement or you want to plan ahead, you can attend this training! The Union Education Trust Training Program will be Friday, October 26, 2018 (6:00pm–9:00pm) thru Saturday, October 27, 2018 (9:00 am-3:00 pm). Retirement planning is an important element of contemporary work life. This program will allow you, your spouse or significant other to develop a comprehensive retirement plan, develop the knowledge to plan for a secure retirement and develop a personalized action plan. The following items will be discussed:

PERS, Financial Planning, Deferred Compensation, Union Benefits Trust, AFSCME Retiree Chapter information, Physical and Mental Health and Overall wellness.

If you are interested in attending this training and would like to register, please contact Beth Lowe, 1-800-969-4702 ext. 2645 or blowe@ocsea.org.

***Hurry... Seating is limited to
the first 100 people***

Location: OCSEA Headquarters

390 Worthington Rd.

Westerville, OH 43082





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Shaping Your Future

Pre-Retirement Program Training Registration Form

October 26-27, 2018



Member Name: _____

Agency: _____ Chapter #: _____

Home Address: _____

Phone Number: _____ home _____ work

My Spouse/Significant Other will attend: **YES** **NO**

Name of Spouse/Significant Other _____

Please indicate any dietary restrictions: _____

**Please Register on or before
October 12, 2018:**

Fax: (614) 865-4012
 Attn: Beth Lowe
 UET Administrative Assistant

Mail: OCSEA –Union Education Trust
 390 Worthington Road, Suite C
 Westerville, Ohio 43082-8331
 Attn: Beth Lowe
 UET Administrative Assistant

Phone: (614) 865-2645 or (800) 969-4702 ext. 2645

Email: blowe@ocsea.org

A registration confirmation will be mailed to the home address indicated above.

We look forward to this opportunity to make pre-retirement planning easier for all eligible state bargaining unit employees and their families.

***** This training will be held at OCSEA Headquarters,
(390 Worthington Rd., Westerville, OH) in the Union Hall *****



UET Pre-Retirement Training Program

Purpose

The purpose of this exciting program is to provide eligible state bargaining unit employees with the opportunity to assess, develop, and refine their retirement plans. Retirement planning is an important element of contemporary work life. Developing and implementing an appropriate retirement plan may have positive impact on the quality of work life during active employment and beyond.

UET provides training and development opportunities to eligible state bargaining unit employees throughout the state of Ohio. UET continuously seeks to expand the training and education opportunities to meet the developmental needs of employees.

Objective/Benefits

This program will allow you, your spouse or significant other to develop a comprehensive retirement plan, develop the knowledge to plan for a secure retirement, and develop a personalized action plan with clear steps toward achieving their retirement goals that comprises of the following aspects of your life:

- Financial Planning
- Physical and mental health
- Social involvement
- Overall wellness

Program Topics

- PERS retirement and health care benefits
- Deferred compensation
- Union Benefits Trust
- Financial planning
- OCSEA retirees chapter
- Health and wellness

This training will be held at OCSEA Headquarters in the Union Hall.




Union Education Trust Pre-Retirement Program Agenda

Friday, October 26, 2018

Registration	5:30 p.m. – 5:45 p.m.
Introduction/Overview	5:45 p.m. – 6:00 p.m.
PERS Retirement Healthcare Benefits	6:00 p.m. – 7:00 p.m.
Break	7:00 p.m. – 7:15 p.m.
PERS Retirement Health Care Benefits	7:15 p.m. – 8:00 p.m.
Q&A	8:00 p.m. – 8:30 p.m.
Closing/Overview for Saturday, October 27, 2018	8:30 p.m. – 8:45 p.m.

Light dinner will be provided

over 

Saturday, October 27, 2018

Registration	8:30 a.m. – 9:00 a.m.
OCSEA Retiree Information	9:00 a.m. – 9:30 a.m.
Ohio Deferred Compensation Program	9:30 a.m. – 10:30 a.m.
<i>Break</i>	<i>10:30 a.m. – 10:45 a.m.</i>
Kemba Financial Planning	10: 45 a.m. – 11:45 a.m.
Union Benefits Trust	11:45 a.m. – 12:15 p.m.
<i>Lunch (provided)</i>	<i>12:15 p.m. – 12:45 p.m.</i>
Health/Wellness	12:45 p.m. – 1:45 p.m.
Evaluations/Closing remarks	1:45 p.m. – 2:15 p.m.

Continental breakfast and lunch will be provided