



Financial Planning Services Available to WEAC Members

	Financial Planning Services offered by WEAC Member Benefits	Retirement Income Analysis offered by WEA Trust Member Benefits												
Description	WEAC members may receive financial planning services by attending a seminar or by scheduling a one-on-one appointment with WEAC CERTIFIED FINANCIAL PLANNER™ Bob Moeller. These seminars and appointments provide a forum to discuss financial topics relevant to WEAC members, including best practices for managing their finances and a retirement prospects overview.	The Retirement Income Analysis offered by WEA Trust Member Benefits is a highly focused retirement planning tool designed to help Wisconsin public school employees—including spouse/partner—prepare for retirement.												
Designed For	This service is appropriate for members of all ages looking for information and guidance on investments, insurance, college savings, debt management, and retirement savings. This may include a general evaluation of a member’s retirement income sources and overall retirement picture.	The Retirement Income Analysis is suitable for members who plan to retire within 10 years. Members looking for a detailed retirement analysis should consider the Retirement Income Analysis to answer questions such as: When can I retire? Do I have enough money to retire? If not, what do I need to do?												
Time Involved	Members may meet individually with Bob Moeller during a one-hour appointment (appointments are limited)—or they may join their colleagues and attend a two-hour seminar held in UniServ offices across the state.	Participating members will receive approximately four hours of face-to-face meeting time and 6 hours of behind-the-scenes analysis time from a Member Benefits’ CERTIFIED FINANCIAL PLANNER™.												
Take Aways	Members receive a greater understanding of their overall financial picture, information and feedback on topics of special concern, as well as a sense of whether they are “on the right track” with respect to their retirement savings and investments.	The analysis helps members define retirement goals, evaluate their current financial position, and determine whether they are on track to retire. Members receive a personalized written analysis which includes: Wisconsin Retirement System estimate, Social Security estimate, a retirement distribution and cash flow analysis, a tax analysis to help members anticipate future income tax liability, and recommended adjustments to help meet goals.												
Cost	No cost. No product sales or commissions associated with this service.	<p>Fee-based service. No product sales or commissions associated with this service.</p> <table border="1" style="width: 100%; text-align: center;"> <thead> <tr> <th>Base Price</th> <th>WEAC Member Discount (\$100)*</th> <th>WEAC-R Member Discount (\$150)*</th> <th>WEA TSA Trust Subsidy ** (\$700)</th> <th>WEA TSA Trust Subsidy** + WEAC Member Discount</th> <th>WEA TSA Trust Subsidy** + WEAC-R Member Discount</th> </tr> </thead> <tbody> <tr> <td>\$1400</td> <td>\$1300</td> <td>\$1250</td> <td>\$700</td> <td>\$600</td> <td>\$550</td> </tr> </tbody> </table> <p><small>*Members are not eligible for both the WEAC Member Discount and the WEAC-R Member Discount. Prices subject to change. **WEA TSA Trust participants may be eligible for a subsidy. Call for details.</small></p>	Base Price	WEAC Member Discount (\$100)*	WEAC-R Member Discount (\$150)*	WEA TSA Trust Subsidy ** (\$700)	WEA TSA Trust Subsidy** + WEAC Member Discount	WEA TSA Trust Subsidy** + WEAC-R Member Discount	\$1400	\$1300	\$1250	\$700	\$600	\$550
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Qualifications	WEAC Member Benefits Financial Planner Robert Moeller is a CERTIFIED FINANCIAL PLANNER™, a Registered Investment Advisor, and a Certified Public Accountant.	Retirement Income Consultant Michelle Slawny is a Registered Investment Advisor and CERTIFIED FINANCIAL PLANNER™.
Consider This Service if You Seek...	<ul style="list-style-type: none"> • Feedback on your retirement savings and investment plan. • An overview of retirement income sources, including an estimate of your Wisconsin Retirement System benefits. • Information and advice on insurance, savings, debt, or college funding. 	<ul style="list-style-type: none"> • A detailed analysis of your retirement income needs and resources. • A year-by-year cash flow analysis for your retirement needs. • Information about account distributions and potential tax impacts. • Written recommendations regarding changes to your retirement income goals.
Who to Contact	Members interested in scheduling a one-on-one appointment should call 1-800-362-8034. To find out when a seminar will be held in your region, please visit the Member Benefits section of weac.org or call 1-800-362-8034. Members are welcome to bring along a spouse or significant other to the seminars and appointments.	Members interested in learning more about the Retirement Income Analysis should call 1-800-279-4030, Ext. 6730.
	 <p>Providing for the professional and personal growth and economic welfare of our members</p> <p>weac.org</p>	 <p>Investment advisory services offered through WEA Financial Advisors, Inc.</p> <p>weabenefits.com</p>