

WEA Member Benefits

Your Yearly Checklist ✓

Perfect for your
fridge!



Spring (March-May)

- ❑ **Review your WRS pension.** Check your Wisconsin Retirement System statement. *Remember, WRS covers just 33%-45% of your retirement needs—let's plan beyond that!*
- ❑ **Enroll in a 403(b).** If you haven't already this year, get started at weabenefits.com/enroll.
- ❑ **Revisit your contribution.** Already enrolled? Consider increasing your contribution by filling out a new Salary Reduction Agreement with your district office before summer. Small steps today may lead to big rewards tomorrow.



Summer (June-August)

- ❑ **Schedule a complimentary consultation.** Don't let summer slip by! Book a financial or insurance consultation at weabenefits.com/consults.
- ❑ **Changing districts?** Open a new 403(b) account with your new district and update your contact information so your savings keep growing.



Fall (September-November)

- ❑ **New to the district?** Ask about enrolling in the 403(b) plan—it's simple. Create your online account and submit your Salary Reduction Agreement. Need help? Call us at 1-800-279-4030 or book an enrollment consultation at weabenefits.com/enroll.
- ❑ **Be a mentor.** Already a 403(b) pro? Help a new colleague get started. Your encouragement can make all the difference.
- ❑ **Attend financial seminars.** If your district offers back-to-school financial sessions, make sure to attend. Learn how to make your money work as hard as you do!



Winter (December-February)

- ❑ **Review your spending.** New year, new goals! Take a look at your spending habits. Can you cut back to save more for your future? Use our budget sheet at weabenefits.com/budget.
- ❑ **Find an investing buddy.** Team up with a coworker who is also focused on long-term investing. Sharing your goals will keep you both motivated through the winter months.

Simple steps, big impact ✓

Every step you take today can make a huge difference for your future. If you need help, don't hesitate to reach out.

 **WEA**
Member Benefits®
1-800-279-4030
weabenefits.com

The 403(b) retirement program is offered by the WEA TSA Trust. Retirement and Investment program registered representatives offer securities through WEA Investment Services, Inc., member FINRA. Some financial planning consultations may be free, and seminars are free to attend; however, if you choose to invest in the WEA Tax Sheltered Annuity or WEA Member Benefits IRA program, fees will apply. Consider all expenses before investing. WEA TSA Trust, WEA Investment Services, Inc., and WEA Financial Advisors, Inc. are affiliated companies, collectively referred to as "WEA Member Benefits."