WEA Member Benefits

Your Yearly Checklist ✓

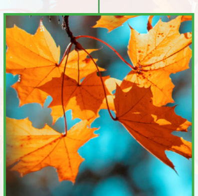
Perfect for your fridge!

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.

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1-800-279-4030

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