

RETIREMENT GET-TOGETHERS AGENDA

INTRO BY MODERATOR

- Get-Togethers (goals and methods and finances)
- An overview of retirement
- Possibilities
- Finances
- Others

PRESENTATIONS ON SOCIAL SECURITY

- Yearly notice in the mail
- 3 months before you're 62 or older, go to Social Security and have:
 - Numbers crunched
 - Paperwork completed
- Sign, submit application, etc. Wait.

REMARKS AND QUESTIONS PERIOD

PRESENTATION ON PENSION

- Call Allied 2-3 months in advance
- Qualifying year is pro-rated
- Work with Allied rep to:
 - Submit necessary paperwork
 - Fill out and file application
 - Wait 3 months for first payment(s)
 - Wait 2 to 6 months to resume working 39 hours/month

REMARKS AND QUESTIONS

PRESENTATIONS ON MEDICAL AND EARLY RETIREMENT

- Social Security
- Pension
- Medicare
- Medical Insurance

REMARKS AND QUESTIONS

CLOSING REMARKS BY MODERATOR

- Information guides
- Thanks

OPEN-ENDED Q&A PERIOD