Dear PSEA Member:

Are you starting to think about planning your retirement? Here’s your opportunity to learn the details of the Pennsylvania School Employees’ Retirement System (PSERS) so that you are prepared to make critical decisions about your pension and health care options within that system. Please note that this workshop does not satisfy the PSERS group meeting requirement.

Eastern Region’s Pre-Retirement Workshop will be held on Saturday, March 28, 2020, at Bear Creek Mountain Resort (101 Doe Mountain Lane, Macungie; see reverse side for directions). This workshop is open to all PSEA members and their spouses/significant others and is sponsored through the joint efforts of the Eastern Region PSEA Retirement & Welfare Committee and the Member Benefits Board, two groups of your fellow members who have volunteered to help.

Space is limited for this workshop, and it has filled up quickly in the past. To register, please complete the enclosed registration form and mail along with your check no later than March 13, 2020. Closer to the workshop, you will be sent a confirmation postcard. You will need to bring this postcard with you in order to register the morning of the workshop.

We look forward to seeing you on March 28 at Bear Creek Mountain Resort.

Sincerely,

Bryan Sanguinito
Eastern Region President

Note: Refunds will be made if you are unable to attend and notify us on or before March 20, 2020. We may have a waiting list so please do not arrange for your own substitute.

Enclosures
DIRECTIONS TO
Bear Creek Mountain Resort
& Conference Center
101 Doe Mountain Lane • Macungie, PA 18062 • 610-682-7100

From Philadelphia/South:
Take I-476 North (the PA Turnpike Northeast Extension) to exit 44/Quakertown. Turn right onto Route 663 South towards Pennsburg. Turn right onto Route 29 North and follow to the Route 100 intersection. Continue straight at traffic light (do not follow 100/29) for 4 miles to Bear Creek.

From New Jersey/East:
Take 1-78 West to Route 100 South via exit 49A/Trexlertown. Follow Route 100 South into Macungie. Turn right onto Church Street (becomes Mountain Road) and continue 5 miles to "T". Turn left onto State Street and continue ½ mile to Bear Creek.

From Harrisburg:
Take I-78 East to Route 100 South via the Trexlertown exit. Follow Route 100 South into Macungie. Turn right onto Church Street (becomes Mountain Road) and continue 5 miles to "T". Turn left onto State Street and continue ½ mile to Bear Creek.

From Reading/Lancaster:
Take Route 222 North through Temple. Turn right onto Route 73 East and continue ½ mile to first traffic light. Turn left at light. Follow approximately 15 miles to Bear Creek.

From Allentown:
Take Route 222 South to Route 100 South into Macungie. Turn right onto Church Street (becomes Mountain Road) and continue 5 miles to "T". Turn left onto State Street and continue ½ mile to Bear Creek.
Eastern Region Pre-Retirement Workshop
March 28, 2020 ◆ Bear Creek Mountain Resort

Tentative Agenda
(see reverse side for session descriptors)

8:00 – 8:30 a.m.  Registration and Continental Breakfast
(in order to register, must show confirmation postcard)

8:30 – 8:45 a.m.  Opening Remarks and Introductions

9:00 – 11:45 a.m.  Retirement Options for your Pension
Dan Mercer, PSEA Assistant Director of Research

PSERS HOP (Health Options Program)
Wanda Tracey, Independent Consultant for PSERS HOP

Luncheon

1:00 – 2:00 p.m.  Breakout Sessions
• Member Benefits
• Estate Planning
• Long-Term Care
• ID Theft/Safety

2:15 – 3:15 p.m.  Breakout Sessions
• Member Benefits
• Estate Planning
• Long-Term Care
• ID Theft/Safety

3:30 – 3:45 p.m.  Closing Remarks
Seminar Evaluation Forms

(over)
General Session Descriptors

Retirement Options for your Pension
Presenter: Dan Mercer, PSEA Assistant Director of Research
After years of contributing to PSERS, you must now consider which monthly income options to choose, as well as how to handle your contributions and interest account. You may even qualify for some health insurance premium assistance after you retire!

PSERS HOP (Health Options Program)
Presenter: Wanda Tracey, Independent Consultant for the PSERS HOP
Wanda travels throughout the state to educate retirees and potential retirees about health care coverage after retirement. The presentation will focus on the various health insurance options available to school retirees and Medicare eligible plans through the PSERS Health Options Program. PSERS Premium Assistance benefit program will also be included.

Breakout Session Descriptors

Membership Doesn’t Cost . . . it PAYS!
Presenter: Joe Thayer, PSEA Member Benefits
For all you do, you deserve the best. Join us to learn more about the money-saving benefits of membership. In this session you will learn:
• Who oversees the Member Benefits Program.
• How products and services are selected.
• What products and services are available.
• What are the benefits to members.
• How to access the NEA & PSEA-endorsed products and services.

Estate Planning for Retirement and Beyond
Presenter: R. Nicholas Nanovic, Esquire
With retirement on the horizon, it is important to review your goals and adjust your estate planning documents, if necessary. Go beyond the basics with Attorney Nanovic as he answers your questions on how to avoid known problem areas and be best prepared for your Golden Years.

Long-Term Care: Protecting your Assets from a Nursing Home
Presenter: Kades-Margolis
Find out ways to utilize new hybrid policies offered by insurance companies that work as Long-Term Care Insurance and Life Insurance. Have the peace of mind that your assets will stay in your family regardless of how long you live or any health challenges you may face later in life.

ID Theft and Online Safety
Presenter: Daniel T. Welker, Executive Sales Rep., Liberty Mutual
This session will cover what identity theft is, how it occurs and ways to protect yourself. We will also discuss:
• How personal information is used
• Examples of Internet fraud and how to avoid it
• What resources are available and what to do if you are victimized
• What cyber security is and how it can affect you and your family
• How to recognize you have become a victim and what resources are available
• How to separate good emails from bad before they cause harm.
EASTERN REGION PRE-RETIREMENT WORKSHOP
March 28, 2020 ♦ Bear Creek Mountain Resort

REGISTRATION FORM

Registration Fee: $30 per person
Registration Deadline: March 13, 2020

Please note — your registration will not be processed until payment is received.

PSEA Member Name __________________________________________________________

Name of Spouse/Significant Other (if attending) ___________________________________

Local Assn (spell out) __________________________________________________________

Home Street Address __________________________________________________________

Home City/State/ZIP __________________________________________________________

Email __________________________________________________ (this will be used to send a follow-up confirmation)

Phone # (home/cell) __________________________ (work) _____________________________

Special Dietary Restrictions __________________________________________________

Breakout Sessions (attend 1 per time slot) (see enclosed Session Descriptors)

Saturday, 1:00 – 2:00 p.m. (SELECT 1st and 2nd CHOICE)

Member Spouse/Spouse/Significant Other

- ___ ___ Member Benefits
- ___ ___ Estate Planning

Member Spouse/Spouse/Significant Other

- ___ ___ Long-Term Care
- ___ ___ ID Theft/Safety

Saturday, 2:15 – 3:15 p.m. (SELECT 1st and 2nd CHOICE)

Member Spouse/Spouse/Significant Other

- ___ ___ Member Benefits
- ___ ___ Estate Planning

Member Spouse/Spouse/Significant Other

- ___ ___ Long-Term Care
- ___ ___ ID Theft/Safety

Send registration form along with check made payable to PSEA to:

PSEA
Attn: Pre-Retirement Workshop
4950 Medical Center Circle
Allentown, PA 18106

Refunds will be made if you are unable to attend and notify us on or before March 20, 2020.
We may have a waiting list so please do not arrange for your own substitute.