

PRE-RETIREMENT SERIES

Workshops

♦ Open to all PSEA members; register for any session of interest to you ♦



| Topic | A Guide to Your PSERS Retirement | PSERS HOP (Health Options Program) | Estate Planning for Retirement and Beyond | Understanding Social Security |
|--|---|---|--|--|
| Workshop Date/Time and Registration Deadline | <p>October 20, 2025 6:00-7:30 p.m. (RSVP by 10/17/25)</p> | <p>October 27, 2025 6:00-7:30 p.m. (RSVP by 10/24/25)</p> | <p>November 5, 2025 6:00-7:00 p.m. (RSVP by 11/3/25)</p> | <p>November 19, 2025 6:00-7:00 p.m. (RSVP by 11/17/25)</p> |

All workshops will be held via Zoom. Pre-registration is required.
See reverse side for descriptors. To register, visit our website (www.psea.org/er) or send an email to e-rgn@psea.org.



Workshop Descriptors

A Guide to Your PSERS Retirement

Presenter: Corry Schachern, PSEA Asst. Director of Retirement Programs

After years of contributing to PSERS, retirement is finally in your sights. Before you take that step, there are some decisions that need to be made. This session will cover the following topics to assist you in making the appropriate decisions for your situation:

- Various Membership Classes
- Vesting
- Normal and Special Early Retirement
- Deferring your Retirement
- Purchasing Service Credit
- Selecting the Right Benefit Option
- State and Federal Tax Issues

PSERS Website:
<https://www.psers.pa.gov>

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| Workshop Date: | October 20, 2025 |
| Registration Deadline: | October 17, 2025 |

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.

PSERS HOP Website: <https://www.hopbenefits.com/>

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| Workshop Date: | October 27, 2025 |
| Registration Deadline: | October 24, 2025 |

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.

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| Workshop Date: | November 5, 2025 |
| Registration Deadline: | November 3, 2025 |

Understanding Social Security

Presenter: Kades-Margolis

In this session you will learn about:

- When you can claim your monthly benefit
- How timing can affect your monthly benefit
- What happens if you work while collecting benefits



Social Security Website: <https://www.ssa.gov/>

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| Workshop Date: | November 19, 2025 |
| Registration Deadline: | November 17, 2025 |