



## Western Region Pre-Retirement Workshop Agenda

November 8, 2025

(9:00 am – 1:30 pm / Virtual via Zoom)

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| <b>9:00 - 9:30am</b>    | <b>Welcome &amp; Introduction of PSEA Volunteers, Staff and Vendors</b>  |
| <b>9:30 - 9:50 am</b>   | <b>PSEA-Retired Presentation</b>   |
| <b>9:50 - 11:20 am</b>  | <b>Retirement Options for Your Pension</b><br><i>Corry Schachern, PSEA Retirement Consultant</i><br>As your retirement nears, it's time to consider which monthly income options to choose, as well as how to handle your contributions and interest account. You may even have some tax-free benefits coming to you.  |
| <b>11:20 - 12:00 pm</b> | <b>Healthcare Options as You Retire</b><br><i>John Anderson, Senior Vice President – Account Executive, Aon Consulting, Inc. and Stephen Jacobs, Senior Consultant Aon Risk Solutions, Health and Benefits Consulting Group</i><br>Aon Consulting will help address your questions and concerns regarding healthcare in retirement.  |
| <b>12:00 - 12:10 pm</b> | <b>Break</b>   |
| <b>12:10 - 12:30 pm</b> | <b>Wills, Trusts, and Other Legal Documents</b><br><i>Michael Santicola, Santicola, Steele, &amp; Fedeles, P.C. Attorneys At Law</i><br>Do you have a will? How about a living will, a trust, or a power of attorney? Do you know the difference between these legal documents or have questions about which of them might be right for you? This presentation discusses these documents and answers questions you might have so that you can properly protect yourself and your family. |
| <b>12:30 - 1:30 pm</b>  | <b>Transitioning into Retirement</b><br><i>Todd Seagrave, Kades-Margolis Corporation, Financial Advisors</i><br>Some questions we'll explore: Have you thought about how and where you'd like to live in retirement? Have you saved enough? Are your assets correctly invested? Can you protect them from inflation, taxes and "living too long?"  |

**\*Times are approximate**