Roman Catholic Archdiocese of Boston
Pension Plan Information Meeting
Fall 2021

There will be a **Pension Plan Information Meeting** on **Thursday, October 7, 2021, from 6:30-7:30 pm** for any interested participants. **Due to the current COVID-19 virus restrictions, this meeting will be held as webinar, which requires prior registration.**

This session is designed to help you better understand your pension benefit options. The Pension Information Meeting will include a review of current voluntary benefit options and a presentation by an independent financial planner who will provide information to use when considering your options. In addition, an Archdiocese Benefits Office staff member will be available to answer questions regarding the information contained in your personalized package. You are invited to attend with your spouse and/or another trusted advisor.

Confidential individual 15-minute **One-on-One Sessions** with a financial planner from the PFE Group* are available following the Information Session **by appointment only.** These individual sessions are intended to provide you with focused insight and action steps in light of your financial needs and resources. These sessions are not intended to be an exhaustive, open-ended financial planning discussion. The Information Meeting and One-on-One sessions are provided free of charge and will be held by videoconference/screen share. The **One-on-One Sessions** are available as follows:

Thursday, October 7 7:30-9:00 pm

Registration is required
To register for the Information Meeting or an individual One-on-One Session with a PFE financial planner, please e-mail benefits@rcab.org or call at 617-746-5640 **no later than October 1, 2021**.

Be Prepared for your One-on-One Session
To make your 15-minute individual session the most productive, please bring the following items with you:

- Participant Information and Election Form
- Copies of recent statements from other retirement and savings plans (IRA's, 401(k)'s, credit union accounts, etc)
- Information on your combined family income and assets
- Awareness of immediate and long-term financial needs and goals

Please keep in mind that we also encourage you to seek your own financial advice.

*The PFE Group is a leading provider of personal financial education programs. The PFE Group sells no investments or other financial products. Presenters are certified, seasoned financial educators whose primary mission is to motivate people to make informed financial decision with confidence.