Roman Catholic Archdiocese of Boston
Pension Plan Information Meeting
Spring 2019

There will be a **Pension Plan Information Meeting** on **Saturday, May 11, from 9:00-10:30 am** at the Archdiocese Pastoral Center for any interested participants. 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. You are invited to bring the enclosed personalized package of information, along with your spouse and/or another trusted advisor, with you to a meeting. In addition, an Archdiocese Benefits Office staff member will be available to answer questions regarding the information contained in your personalized package.

Confidential individual 15-minute **One-on-One Sessions** with a financial planner from the PFE Group* are **available 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 require prior reservations. The **One-on-One Sessions** are available as follows:

Saturday, May 11 10:30 am-2:00 pm

The session will be held at the Archdiocese of Boston Pastoral Center, 66 Brooks Drive, Braintree, MA.

Registration is required
To register for the Information Meeting or an individual One-on-One Session with a PFE financial planner, please e-mail Bonnie Seifried at bseifried@rcab.org or call at 617-746-5827. **Please note, to arrange for a One-on-One Session, you must call and reserve a time slot at least two weeks prior to the requested date.**

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.