



Presentation Overview

Securing Your Retirement: Participant Presentation

This presentation is about retirement plan education and annual meaningful notice for schools.

Topics addressed

- > The importance of participating in a retirement plan
- > 403(b) plan basics, IRS contribution limits and TPA responsibilities

Target audience

- > Participants and potential participants in an organization's 403(b) retirement plan

Materials available

- > PowerPoint with script
- > Sign in sheet
- > Plan highlights sheet
- > Paycheck estimator flier (optional)
- > Securing your retirement handout

Preparation

- > Review 403(b) plan highlights
- > Print sign in sheet
- > Prepare engagement activity (optional)
- > Review group snapshot
- > Review state pension plan statistics (pewtrusts.org)

Questions: DirectConnectTeam@gaig.com or 800-438-3398 ext. 17197



It pays to keep things simple.®

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Retirement Is Closer Than You Think. Start Planning For It Right Now.

Join a free informative session and learn how your employer 403(b) retirement plan can help you secure your financial future!

Be sure to attend and learn how you can start building your retirement income now, no matter what your age.

When:

Presented by:



Uncomplicate Retirement®



Have You Fulfilled Your Universal Availability Requirement Yet?

I can help!

Universal Availability indicates that meaningful notice of your 403(b) plan must be given to all employees who are eligible to participate. The notice should inform employees how to participate and illustrate the benefits of contributing. **I can help you fulfill this annual requirement!**

My presentation, Securing Your Retirement, will help educate your staff about retirement plans and build participation. It's a great way for you to demonstrate to the IRS that you're doing everything possible to remain in compliance with the Universal Availability regulation. **Include this presentation to help satisfy question 5 of the IRS Section 403(b) Questionnaire!**

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Follow the link to download the Meaningful Notice Presentation:

<https://gaconnect.com/docs/default-source/default-document-library/forms/ailic-materials/meaningful-notice.ppt>