

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

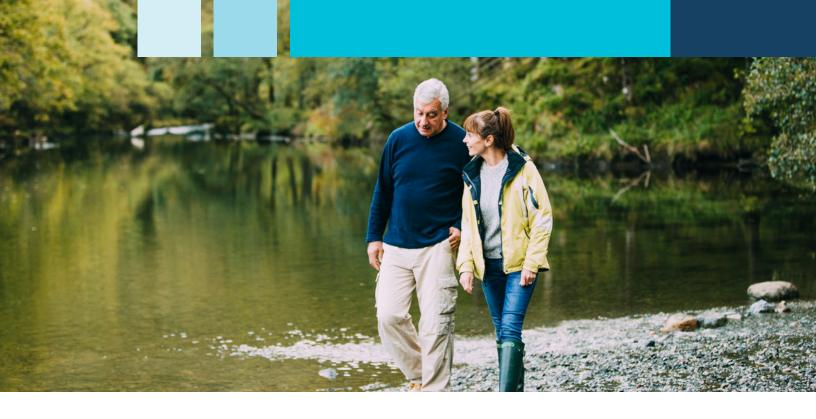


It pays to keep things simple.®

Variable Principal Underwriter/Distributor: Great American Advisors®, Inc., member FINRA and a subsidiary of Great American Financial Resources®, 301 E Fourth Street, Cincinnati, Ohio 45202. Products issued by Annuity Investors Life Insurance Company®, a subsidiary of Great American Financial Resources, Inc.

Not FDIC or NCUSIF Insured No Bank or Credit Union Guarantee May Lose Value Not Insured by any Federal Government Agency Not a Deposit

5270-AIL-A 2/19



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:



2/19



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!

Topics addressed in the presentation:

- The importance of participating in a retirement plan
- Plan basics, IRS contribution limits and TPA responsibilities

Target audience:

 Participants and potential participants in an organization's retirement plan

Materials available:

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



It pays to keep things simple.®

5270-AIL-C 2/19



Securing Your Retirement: Sign In Sheet

This presentation is about your organization's 403(b) retirement plan. It includes plan basics, IRS contribution limits and more.

Date	School District_
Presenter	
Name	

5270-AIL-D 2/19

Follow the link to download the Meaningful Notice Presentation:

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