

*Stacey Braun Associates, Inc.
377 Broadway
New York, NY 10013*

**\$\$ WPTA Welfare Trust Fund \$\$
FINANCIAL COUNSELING PROGRAM**

Services Available to Each Member (*at no cost*):

1. **Free financial consultation each year:** Consultations are held at the Staff Development Center, the local NYSUT office (in Tarrytown) or at Stacey Braun's office in New York City. You can receive up to six hours of time, in person or over the phone or in combination. **For more information or to schedule an appointment call 1-888-949-1925.** Spouses and/or other family members may attend consultations with you.
2. **Unlimited access to Stacey Braun's proprietary website:** This password protected website is a useful financial tool intended to address many of your financial concerns. The website contains financial narratives, market data, quotes, charts, portfolio tracking, financial news, financial glossary, financial calculators, links to other useful financial sites and the email helpdesk. To access the site use "money" as your password and "whiteplains" as the User ID.
3. **Unlimited use of Stacey Braun's email helpdesk:** To provide answers to basic financial questions, you have access to qualified professionals via Stacey Braun's email helpdesk.

Topics for consultations include, but are not limited to:

Retirement Planning, Refinancing, Mortgages, Debt Management, Budgeting, Divorce, Investments (403b, Pension Advice), Mutual Fund Questions, Asset Allocation, Establishing Risk Tolerance, Taxes, Inheritance Issues, Gifting, Estate Planning, Savings, Cash Flow, General Education, Elder Care, Social Security, Education Funding (i.e. 529 plans), Second Opinions & Life, Disability and Long-Term Care Insurance

***STACEY BRAUN PERSONNEL
ARE PROHIBITED FROM SELLING INVESTMENTS OR INSURANCE PRODUCTS***

STACEY BRAUN IS NOT AFFILIATED WITH ANY 403(b) PROVIDERS

2018-2019 Financial Counseling Consultation Dates:

September 20, October 18, November 8, December 13, January 17, February 21, March 7, April 18, May 16, June 20