



# PERALTA BENEFITS – EVERYONE



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## Benefits Spotlight: Free Financial Planning – Keenan Financial Services

### DID YOU KNOW...?

Without proper planning your defined benefit pension plan (STRS or PERS) may not be enough to retire on and maintain your quality of life. As a benefit of your Peralta employment, you are encouraged to take advantage of free personal financial planning with Keenan Financial Services. Meet with a Keenan representative to review your personal financial plan.

District Representative, George Tarwater will be holding personal, individual appointments next Tuesday, April 29<sup>th</sup> & Wednesday, April 30<sup>th</sup>. You can schedule your appointment now by contacting Lori Wheeler at 877-544-4380 ext. 5203 or [lwheeler@keenan.com](mailto:lwheeler@keenan.com).

Through your personal meeting, you will:

- understand your PERS/STRS benefit;
- develop a personalized, detailed retirement plan;
- assess your financial goals, assets, risk tolerance; and
- receive guidance with any transfers or rollovers from previous employer's retirement plans.

## The CalPERS Long-term Care Program



Have you been wondering what long-term care is all about? Financial planning often includes a good long-term care facility or nursing home.

You are cordially invited to an informational session about long term care

**When: Thursday, May 29, 2008**  
**Where: District Benefits Office –Atrium**  
**Time: Noon – 1pm**  
**Guest Speaker: Jeanne L. Schafer, CalPERS Long Term Care Program.**

*You may apply for coverage from 4/1-6/30. The Program is not for profit. It offers a good selection of plans and the premiums are competitive.*

## DISTRICT PICNIC AT WATERWORLD (IN CONCORD) ON SATURDAY, JUNE 21 -SAVE THE DATE

More to follow in the coming weeks...

The Benefits Office is excited to coordinate a District-wide picnic. Tickets will be available at a group rate of \$20 each and include:

- Admission to the park and access to water-rides during park hours from 10:30 – 7:30
- Hamburgers, hot dogs, vegetarian options, beverages, a variety of salads & more!
- Our own picnic area (no outside food is permitted)

### CHECK OUT YOUR BENEFITS INFORMATION CENTER (BIC)!



To learn more about your life insurance benefits, as well as other District-sponsored benefit plans, please visit your Benefit Information Center (BIC) website:

[www.peralta.pswbenefits.net](http://www.peralta.pswbenefits.net) or [www.peraltaretires.pswbenefits.net](http://www.peraltaretires.pswbenefits.net)