

SFA TRUST FUND **FINANCIAL COUNSELING PROGRAM BENEFIT**

The Financial Counseling Program is intended to provide you with access to qualified professionals, Certified Financial Planners® and Registered Investment Advisors who are available to work with you to provide objective and unbiased advice regarding: debt management, 403b allocations and decisions, retirement planning, insurance, investing, college planning, budgeting, 403b rollovers, and much more.

Services Available to Each Member (at no cost):

- Free financial consultation each year: Consultations are held at school locations, 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.
- 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.
- 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.

If you are interested in taking advantage of the Financial Counseling Program, please contact Stacey Braun Associates, Inc. at 1-888-949-1925. You can also visit her website for members.

www.staceybraun.com

Username: somers

Password: money

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

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