

Let's Talk Retirement

SchoolsFirst Plan Administration¹ is your district's third party administrator (TPA) and has been serving California school districts for more than 40 years. Now in partnership with SchoolsFirst Retirement Planning, we provide education on available plans and possible tax benefits to help you plan for your future. We hold ourselves to the highest standards of integrity, professional ethics and service.

Why supplement your CalSTRS or CalPERS pension?

On average, your pension replaces 50%-60% of income in retirement.² Studies show at a minimum, you'll need about 80% income replacement to maintain the same standard of living in retirement.³

We're here to help. Join our in-person or virtual workshop.

We'll talk about:

- ✓ Retirement plan options available to you.
- ✓ How much you should be saving each month.
- ✓ The possible tax benefits of starting your retirement plan.
- ✓ Your existing retirement accounts.

Schedule a consultation:

Kim Romo
Financial Representative

Phone: (657) 650 - 9220
Email: kromo@schoolsfirstfcu.org

Available for appointments at SchoolsFirst FCU branch locations, Zoom, and Phone.

Scan QR code below to schedule an appointment:



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1. SchoolsFirst Plan Administration is not affiliated with LPL Financial or SchoolsFirst Retirement Planning. 2. California State Teachers' Retirement System Member Handbook, 2023. 3. "How much will you spend in retirement?" Fidelity.com, 2022.

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