

TO: Members of CSU, FSU and PSU seeking a consultation about MSERS retirement
FROM: Ed McCourt, MTA Retirement Consultant – Higher Ed
DATE: June 13, 2017
RE: Availability of June 26 individual retirement consulting sessions on the UMass-Boston campus.

Why should I sign up for a retirement consulting session?

To secure answers to questions about retirement as they relate to your specific situation. For example:

- Given my age and my service, when is the best time for me to retire?
- I've heard that members may be able to "buy back" service. Might I have a buy back opportunity?
- I'm involved with the Section-60 option for transfer into the MSERS? Where I am in this process?
- Why take option "C" instead of Option "A" or "B"?
- How will my Social Security benefit be affected by my State retirement?
- Where will I stand with health insurance in retirement? Will I be going into Medicare?
- As I move toward retirement, what, if any, options exist for me to enhance my retirement benefit?

Most members leave retirement consulting sessions with a better sense of how to approach retirement.

What consulting session slots have been made available at UMass-Boston for Monday, June 26?

8:30 - 9:10	9:20 - 10:00	10:10 - 10:50	11:00 - 11:40	11:50 - 12:30	1:00 - 1:40	1:50 - 2:30	2:40 - 3:20	3:30 - 4:00	4:10 - 4:50	5:00 - 5:40

Kindly **send your appointment request to me** at emccourt.mccc@gmail.com. Replies should include your **full name**, your **unit name**, an **email address**, a best **phone contact**, **three possible appointment times on Mon. 6/26** and your **MTA Membership number**. Please note, if you **are able to come at any time on a specific date**, please state that. This may improve the likelihood of your being accommodated. To assist in the response process, you might **copy the table form immediately below, paste it into your reply email, complete it and send it back to me**.

Your Name (Last/First):	
Member of CWU? – FSU? – PSU? :	
Best email:	
Best phone contact:	
Appointment time(s) requesting:	
MTA membership card number:	
No membership card or number? Well before our appointment, email membership@massteacher.org or call MTA's Division of Affiliate Services at 1-800-392-6175 ext. 8208. We realize that this is an extra step for many, but it insures that retirement counseling is provided exclusively to MTA members.	

I will try to reply to you within 2-days. In my reply, I will provide additional information.

Thanks,
 Ed McCourt
 MTA Retirement Consultant - Higher Ed
 781-325-2553