

*NPUT*

# *BULLETIN*

## *E-MAIL*

### *NEW PALTZ UNITED TEACHERS BENEFIT TRUST FUND*

Ron Noelle,  
Administrator

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Ron Simon, Asst. Administrator  
Jon Stern, Asst. Administrator

**June 26, 2017**

## **FINANCIAL COUNSELING PROGRAM**

**On June 1, 2017, your Trustees approved the Stacy Braun Financial Counseling Program for ALL ACTIVE members. The Plan is paid for by the Trust Fund and will be effective July 1, 2017.**

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

- 1. Free financial consultations annually: Consultations are held at schools, the union office, the local NYSUT office (in Kingston), 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 "newpaltz" 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***

Call Stacey Braun Assoc. at (888) 9949-1925 to make an appointment.

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

**STACEY BRAUN IS NOT AFFILIATED WITH ANY 403(B) PROVIDERS**