

What is Road to Retirement?

Road to Retirement is a retirement education program available exclusively to union members. Participation in the program will help you better understand and prepare for retirement.

What will members learn?

Retirement Benefits

Timing Social Security Benefits

401(k) Insights

Medicare Basics

Essential Retirement Planning Steps

5 Keys to a Happy, Fulfilling Retirement

How Financial Professionals are Compensated

The Role of a Financial Professional

The Reality of Retirement – How Retirement Plays Out Financially

Estate Planning Basics

Navigating a Surplus

Understanding Financial Markets

Discover Your Retirement Preparedness Score

Road to Retirement

Road to Retirement



Making Investments Make Sense

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A retirement education program
for union members.

Road to Retirement

When and how are the presentations held?

The educational programs are conducted each month throughout the year. Most are held as online webinars so participating is convenient. Webinars are typically conducted on weeknights and may be repeated Saturday mornings. We also hold in-person workshops throughout the year. This way, you can participate in whatever format fits your schedule.

How do I get started?

It's as easy as registering for an upcoming webinar/seminar. If you prefer, simply schedule a one-on-one 20-minute meeting to discover your Retirement Preparedness Score (RPS).

What does the program cost?

There is no cost to you to participate in the education webinars or discover your RPS. If you choose to work with us to implement and manage your personalized retirement plan, certain costs/fees will apply. Details are provided during the planning process. We are open and transparent in all we do.

What do you do to help members start planning for a happy, fulfilling retirement?

The first step is to discover your Retirement Preparedness Score (RPS). The RPS will help you know where you stand today with regards to your overall retirement preparedness. Once we know your score, we will provide a personalized RPS Action Plan that can be used to improve your score over time. The higher the RPS Score, the more prepared you are for retirement. Helping manage this retirement planning phase is our first job. The education programs are a great way for you to increase your retirement preparedness.

Do I have to choose NettWorth Financial Group to handle my retirement if I attend the education programs?

Absolutely not! In fact, our program includes education about the importance of choosing the right financial professional and will help you know how to better make that decision.

Do you offer any other special programs to union members?

Yes. We have the Donna Castleberry Scholarship program, through which we award \$1,000 scholarships to twenty children of union members each year. We have awarded more than \$300,000 in scholarships to date.



SCAN TO REGISTER FOR AN EVENT



SCAN TO SCHEDULE AN APPOINTMENT WITH Lee Levy