



Group Financial Counseling Program

From Stacey Braun Associates, Inc.

Endorsed by NYSUT Member Benefits Corporation





The Mount Pleasant Teachers Trust Fund Financial Counseling Program

We are pleased to announce that the The Mount Pleasant Teachers Trust Fund voted to provide the NYSUT Member Benefits endorsed Financial Counseling Program for all participating members. The program is designed to provide you with a personal financial planner to review your finances, to help answer your financial questions and/or assist you with the development of a financial strategy. There is no out of pocket cost to you, the program is paid for by the The Mount Pleasant Teachers Trust Fund.

Stacey Braun Associates, Inc. is the firm that administers the program and is one of the 500 largest investment advisors in the world.

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 customized financial advice.

Services available at no cost to you

1 Free financial consultations annually

Consultations are held at school or Union locations, the local NYSUT office (in Woodbury or 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 **(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 "**mountpleasant**" 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 review include, but are not limited to:

Retirement Planning, Refinancing, Mortgages, Debt Management, Budgeting, Divorce, Investments (403B, Pension Advice), 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 not allowed to earn commissions from investment or insurance products.

Stacey Braun Association, Inc. is not affiliated with any 403(b) provider.

What other members are saying about the program

“All our financial questions were thoughtfully and completely addressed.

I left feeling positive about my financial situation and how to better handle my money.

I really like that there are no strings attached to this consultation and that the advisor listened well, was nonjudgmental and was down to earth in his advisement.

Very helpful, no nonsense and common sense approach. Information was presented in an understandable and clear format.”

The Financial Counseling Program is provided by:

Stacey Braun Associates, Inc.
377 Broadway
New York, NY 10013

(888) 949-1925

Financial advice from experts who will not sell investment or insurance products.

Stacey Braun personnel are prohibited from selling investments or insurance products. Stacey Braun is not affiliated with any 403(b) providers.

The Stacey Braun Associates, Inc. Group Financial Counseling Program is a NYSUT Member Benefits Corporation (Member Benefits)-endorsed program. Under an agreement with Stacey Braun, Member Benefits has an endorsement arrangement of \$5 per participant. All such payments to Member Benefits are used solely to defray the costs of administering its various programs and, where appropriate, to enhance them. Member Benefits acts as your advocate; please contact Member Benefits at **(800) 626-8101** if you experience a problem with any endorsed program.