






## Empowering you with **FINANCIAL KNOWLEDGE**

As a Wisconsin public school employee, you have access to free financial education and resources designed to help you make confident money decisions now and in the future.

Take advantage of:

- ▶ Financial wellness seminars through your district
- ▶ Helpful tools, articles, calculators, and videos at [weabenefits.com](http://weabenefits.com)
- ▶ Ongoing tips and updates—follow us on social media    

 1-800-279-4030  [weabenefits.com](http://weabenefits.com)  [memberbenefits@weabenefits.com](mailto:memberbenefits@weabenefits.com)

The 403(b) retirement program is offered by the WEA TSA Trust. TSA and IRA program registered representatives are licensed through, and securities are offered through, WEA Investment Services, Inc. member FINRA. The Trustee Custodian for the WEA Member Benefits IRA accounts is Matrix Trust Company. The Trustee Custodian for the Personal Investment Accounts is American Trust Custody. The Personal Investment Account program and all advisory services are offered through WEA Financial Advisors, Inc., an SEC registered investment advisor. Some consultations may be free, call us for details. If you choose to invest in the WEA Tax Sheltered Annuity Trust 403(b), WEA Member Benefits IRA, or WEA Member Benefits Personal Investment Account programs, fees will apply. Consider all expenses before investing. Must meet eligibility rules to participate. Fees and services subject to change. Terms controlled by signed service agreement. Investments involve risks, including loss of principal. Property and casualty insurance programs are underwritten by WEA Property & Casualty Insurance Company. The terms and conditions of your coverage are exclusively controlled by your written policy. Please refer to your policy for details. The life insurance program is offered and administered by Associates of Clifton Park. Life insurance products are underwritten by multiple life insurance carriers. FS 4543-240-0825



# EVERY MEMBER **FINANCIALLY SECURE**

*You make a difference in people's lives every day.*

Let us help make a difference in your life by helping you become financially secure.

# ABOUT US

Created by educators, for educators, we have been committed to the financial well-being of Wisconsin public school employees for more than 50 years. From retirement savings and financial planning to personal insurance and educational resources, our programs are designed specifically to meet the unique needs of public school employees and their families.

We're here to be your partner in every stage of life, helping you make confident financial decisions with personal, local support you can count on.

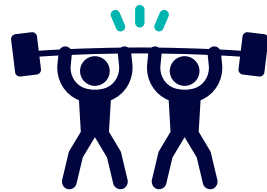
## HOW WE DO BUSINESS

WEA Member Benefits operates as a trust, reinvesting any profits back into programs that support our participants. With no shareholders to satisfy, we focus on serving you by offering quality, competitively priced products designed to meet your needs— not drive profits.



### TRUSTED SUPPORT

Personalized guidance from consultants who aren't paid on commission, so you get advice that's truly in your best interest.



### COLLECTIVE BUYING POWER

We use the strength of group purchasing to keep costs low without sacrificing quality.



### TALK TO A REAL PERSON

No bots, just friendly, knowledgeable staff ready to listen, answer your questions, and provide real support when you need it.



### We're here to help you to and through retirement.

Scan here to schedule your FREE consultation with a Member Benefits Consultant—retired educators who truly understand the unique financial challenges of public school employees.

Or visit us online [weabenefits.com/consults](https://weabenefits.com/consults)



## WHAT WE OFFER



### PERSONAL INSURANCE PROGRAMS

High-quality insurance and service designed exclusively for public school employees and their families. We offer coverage for **auto, home, life, and more**. See what discounts and advantages you may be eligible for at [weabenefits.com/insurance](https://weabenefits.com/insurance).



### RETIREMENT AND INVESTMENT SERVICES

Our savings programs offer flexibility, low fees, and access to experienced savings consultants to help you meet your goals.

- ▶ **403(b)**: A nationally recognized, low-cost retirement savings option for Wisconsin public school employees.
- ▶ **IRA**: Flexible investment options, low fees, and open to family members.
- ▶ **Personal Investment Account**: A non-retirement investment account to grow your money beyond traditional savings or checking accounts.



### FINANCIAL PLANNING SERVICES

Whether you're just starting out or preparing for retirement, having a financial plan helps you see the big picture, set goals, and stay on track.

- ▶ **DIY Financial Planning**: A free interactive wealth management tool for 403(b) account holders, with built-in guidance from our financial advisors.
- ▶ **Financial Coaching**: One-on-one support for those new to investing or seeking help with basic financial topics.
- ▶ **Financial Planning Advice**: Personalized guidance to review your portfolio or assess your retirement readiness.