



7/20/17

## **\*Roth and Pre-tax 401k/Financial Planning\***

**When:** October – November (4 weeks)

**Who:** All Local 402 and 658 members, retirees, family, and friends

**Where:** Local 402 Union Hall

I am planning 4 classes this fall to address questions about retirement planning. The first class will be for those who have Roth and Pre-tax 401k questions and therefore designed with newer hires in mind. Please send me questions or concerns you may have about planning your financial future through your steward or the Union Hall. Also, feel free to contact me directly through email [deron.blakely@navistar.com](mailto:deron.blakely@navistar.com) or my in-plant ext. 4339 (390-4339). This will help to ensure that we address your concerns and questions in the classes.

I will have a 401k specialist at these meetings to help address your concerns and questions and explain the benefits as well as possible strategies to help best fit your plan for retirement. We will cover such issues as company match, company contributions (age-weighted), vesting, using the Empower website investment tools and more.

Week 1 will be designed for newer hires and 401k concerns. Week 2 will cover estate planning questions. Week 3 will cover questions and concerns you may have about Social Security and week 4 will be for the older hires covering healthcare and pension.

Again, please send your questions and concerns so that I can be sure that we address them and it will help to gauge the interest in this type of seminar.

In Solidarity,

A handwritten signature in black ink that reads 'Deron R. Blakely'.

Deron R. Blakely  
Benefits Rep  
UAW Local 402