Retirement Plan Services

ALERAGROUP

You're invited

Join us on Thursday, August 14 at 2p.m. ET

Understanding Medicare

Whether you're approaching retirement, already enrolled, or helping a loved one navigate the system, understanding Medicare is essential to protecting your health and finances. We're excited to welcome special guest Tessa Rado-Brosky, Director of Medicare Consulting at Alera Group, who will join us to guide you through the ins and outs of Medicare, from enrollment timing to avoiding costly mistakes, so you can prepare with confidence.

Why this matters:

Medicare decisions can have lifelong impacts, from your monthly premiums to your access to care. Delaying or misunderstanding your options can lead to higher costs and penalties. This workshop will help you understand your choices, timing and next steps.

WHAT YOU'LL LEARN:

- How do the different Parts of Medicare work for you?
- How do I maximize my benefits and reduce out-of-pocket costs in retirement?
- Do I need to enroll in Medicare and when should I start?

WHO SHOULD ATTEND?

- Those nearing age 65 or newly eligible for Medicare.
- Anyone helping parents or loved ones navigate Medicare.
- Employees planning for retirement or comparing employer coverage.

Unable to attend? No problem! Register anyway, and we'll send you the event recording.

SCAN THE CODE

or click here

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Future FinWell Connect sessions:

September 11: Navigating Financial Aid (FAFSA)

October 9: Philanthropic and Charitable Giving Strategies

November 13: Financial Planning for Veteran Families

December 11: End of Year Financial Checklist

Past event recordings:

- **January 9:** Smart Spending and Savings Strategies
- **February 13:** Love and Money: Financial Planning for Couples
- **March 13:** Financial Planning Considerations for Women
- **April 18:** Behavioral Finance and Money Psychology
- **May 8:** Advanced Investment Strategies and Tax Optimization
- **June 12**: Maximizing Social Security
- **July 10**: Smart Planning for Dependent Care

About Alera Group

Alera Group is an independent financial services firm with $1.5 billion in gross revenue, offering comprehensive property and casualty insurance, employee benefits, wealth services and retirement plan solutions to clients nationwide. Working collaboratively across specialties and across the country, Alera Group's team of more than 4,500 colleagues offer unique solutions, personalized services and proactive insights to help ensure each client's business and personal success. For more information, visit **aleragroup.com** and follow us on **LinkedIn**.

*STATISTICS ACCURATE AS OF JANUARY 1, 2025.

SOCIAL MEDIA

FinWell Connect is an educational platform and referral program offered by Alera Group. Participation is not a requirement of your employer plan.

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