SUFFOLK COUNTY MUNICIPAL EMPLOYEES BENEFIT FUND

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SCOTT MIRABELLA, ADMINISTRATOR

Chairman Levler and the Board of Trustees encourage members to take advantage of these exciting new benefits including; no cost Retirement Consultation for members approaching retirement age; no cost Financial Planning for retirement, Money Management and Debt Consolidation; and Elder Law, which includes no cost Estate Planning documents and Elder Law Consultation for members, parents, and parents-in-law.

Retirement Consultation

Bob Draffin of Dynamic Retirement Solutions

Our active members now have retirement consultation services available to them at no cost. Bob Draffin has served 37-years across his career with Suffolk County and will provide one-on-one personal consultations for all members who wish to discuss their retirement benefits. Consultations can be either in person or via telephone and will include retirement pension projections, beneficiary options, all the preparations needed for filing for retirement along with a review of your benefits as a retiree. These consultations will also allow you to get the answers to all the questions you have concerning your retirement. So, if you are within 5 years of retirement, Bob recommends making an appointment and having a consultation to start planning for your future after retirement!

AME Members, Management-Exempt and non-uniformed members - 631-319-4099
SCCOA Members - 631-208-1301
DSPBA Members - 631-289-1768

Financial Planning

JB Greco & Associates

JBGRECO & ASSOCIATES
631-617-5710

Our members and dependents now have free access to personal financial advisor, Jeffrey B. Greco, CLU, ChFC, CFS, RHU, REBC, CLTC of JB Greco & Associates. You can receive assistance on retirement investment strategies, debt consolidation and ALL financial matters. This is a great resource for planning for your future and it's available at no cost!

JB Greco & Associates understands the many challenges of today's economic environment and provides personalized strategies for everyone from current day savers to those in a successful retirement. The current environment of investments, interest rates, inflation, taxes, and debt are everyday concerns that impact your financial well-being.

JB Greco & Associates are available for you, whether you are, newly hired, approaching retirement, planning for a life event or just want to ensure a sound financial future, please call for a free appointment to take advantage of this valuable resource. The personalized, hands-on service and education about your financial position and products will provide the framework for a customized financial plan to provide the guidance you may need.

JB Greco & Associates services include:

Investments

Tax-Managed Investments, Brokerage Accounts, Fixed Products, Bonds, Common Stock, Educational IRA, Traditional IRA, Roth IRA, SEP IRA, Simple IRA and, Annuities

Financial Planning

Pension Analysis, Workplace Retirement, 457(b) Planning, Retirement Plans, 403(b) Planning, College Plans, Estate Plans

Insurance
Disability Income Insurance, Life Insurance, Long-Term-Care Insurance

Call Today 631.617.5710 to make your free appointment.

JB Greco & Associates, Inc.
631.617.5710 (Office)
631.278.2137 (Cell)
www. Jbgreco.company

Estate Planning and Elder Law for Members, Parents and Parents in Law.

Feldman, Kramer & Monaco Law Firm

In addition to the many free or very low-cost legal services members now enjoy from Feldman Kramer and Monaco, members may now receive certain Free Estate Planning documents **for parents and parents-in-law who reside in New York State,** including:

- Last Will and Testament – (with minor's trust)
- Durable Power of Attorney
- Health Care Proxy
- Living Will

There is a maximum of four (4) sets of documents per year.

Free Elder Law Consultation in New York State – up to two (2) hours free.

An Elder Law consultation generally includes the following:

(a) Financial review and analysis, including review of all assets, real and personal; how the assets are held; examination of all sources of income in addition to income produced by assets, including pension benefits, Social Security benefits, payments from annuities, and other instruments such as trusts, contracts of sale, mortgage notes, and other secured or non-secured obligations; and review of all life insurance held, including the face value and cash surrender values thereof.
(b) Health Care insurance review, including an analysis of existing Medicare and Medicare Supplements benefits as well as long-term care insurance benefits.
(c) Health Care analysis, including review of existing conditions, inquiry into competency, review of discharge planning, and available options, where appropriate.
(d) Review of current documentation, including existing wills, trusts, powers of attorney, health care proxies, and health care declarations.

Call 800-832-5182 for more information