MENU
of Education Options

MERS®
Municipal Employees' Retirement System

By taking a look at your employees and our "menu" of educational offerings, our professional staff will build a presentation that meets your needs.

Financial expertise delivered to your employees at your convenience by our Certified Financial Education Instructors.

Format Options:

WEBINARS

Webinars are a flexible and convenient option to provide group education to your employees from the comfort of their own desk. Webinars are held live and recorded. This is a perfect option for municipalities with employees on the go as the webinar can be watched live, or a link to recorded version can be provided for others to watch at their convenience.

ZOOMING INTO RETIREMENT

Zooming into Retirement meetings are a great way to provide your employees who are approaching retirement with education about their plan and important information virtually. These are offered several times throughout the year and focus on retirement education for defined benefit and defined contribution plans.

ON-SITE GROUP MEETINGS

Our Benefit Education Specialists are available to come on-site at your convenience to provide customized group education to your employees.

ONE-ON-ONES

Do you have employees who are closing in on retirement and want a better understanding of the benefits they can expect when they enter retirement? One-on-ones are a great way to get your employees the individual education they need to prepare for retirement. For the convenience of your employees, our Service Center can provide one-on-ones over the phone.

ENTRÉES

Product overviews that provide an understanding of benefits, tools to track accounts or make changes, and tips on working toward a secure retirement.
Click ▶ to view sample webinars.

DEFINED BENEFIT OVERVIEW (DB)

DEFINED CONTRIBUTION OVERVIEW (DC)

HYBRID OVERVIEW (H)

HEALTH CARE SAVINGS PROGRAM OVERVIEW (HCSP)

ALA CARTE

Add a serving of one or more of these topics to your presentation for any audience.

- EMERGENCY SAVINGS
- DEBT MANAGEMENT
- BUDGETING

BUFFET OPTIONS

For a pre-built session that includes a mix of topics, you might be interested in one of the options below.
Click ▶ to view sample webinars.

STRATEGIES TO EFFECTIVELY MANAGE FINANCES (All)

We'll walk you through the process to create a financial plan, including defining short, mid and long-term goals, assessing current income and expenses, and examining a savings plan.

READY TO RETIRE: AN OVERVIEW OF THE DB RETIREMENT PROCESS (DB)

For a closer look at how the MERS Defined Benefit Plan works and where it fits into participants' retirement picture.

READY TO RETIRE: AN OVERVIEW OF THE DC RETIREMENT PROCESS (DC)

For a closer look at how the MERS Defined Contribution Plan works and where it fits into participants' retirement picture.

HEALTH CARE IN RETIREMENT (All)

During this session, we'll provide an overview of health care options in retirement, including costs and available resources.

INVESTMENT BASICS & SAVINGS OPTIONS (All)

Explores retirement savings choices and helps participants add security to their retirement plan.

ROCK-N-ROLL TO A SUCCESSFUL RETIREMENT USING AC/DC STRATEGIES (DC, DC+, H, 457, HCSP, IRA)

Covers topics such as investment basics and best practices for both the accumulation and decumulation phases of investing.

RETIREMENT PLANNING: 25 TIPS TO HELP YOU PREPARE FOR THE FUTURE (All)

Important "do's" and "don'ts" to help participants prepare as retirement approaches.

SIDES

Sides offer education that supports the entrée. For example, if you offer a participant directed account, you may want to include some investment basics.
Click ▶ to view sample webinars.

INVESTMENT BASICS (DC, DC+, H, 457, HCSP, IRA)

Highlights some basic savings and investment concepts such as why we save, how to invest and the costs associated to investing and how they can impact your overall account balance.

MANAGING & MONITORING INVESTMENTS IN THE ACCUMULATION PHASE

(DC, DC+, H, 457, HCSP, IRA)

Teaches participants in the working phase of their career tips on how to maximize their investments in order to generate more savings for retirement.

MANAGING & MONITORING INVESTMENTS POST-RETIREMENT

(DC, DC+, H, 457, HCSP, IRA)

Helps employees better understand best-practices in decumulation, or spending down their account throughout retirement. Topics covered include diversifying investments, considerations to make your account balance last in retirement and how to plan for inflation.

MANAGING & MONITORING YOUR PORTFOLIO

(DC, DC+, H, 457, HCSP, IRA)

Covers how often invested accounts should be reviewed and where to find your account information. Also highlights how to create and review your investment plan and make changes to your allocations.

MAKING YOUR MONEY WORK FOR YOU

(DC, DC+, H, 457, HCSP, IRA)

Covers the importance of investing money versus saving it in a traditional bank account by explaining the concept of compounding. Additionally, it highlights how to invest during different stages of your life and factors to consider when investing.

RETIREMENT PLANNING (All)

Focuses on topics of financial considerations in retirement, goal-setting, tips to build a retirement budget and health care considerations.

DESSERTS

Top off your session with some information highlighting these topics for all audiences.

- SOCIAL SECURITY BASICS
- MEDICARE BASICS
- HEALTH SAVINGS ACCOUNT BASICS
- HEALTH CARE EXCHANGE BASICS
- IRA BASICS
- 457 SUPPLEMENTAL SAVINGS BASICS
- MERS INVESTMENT MENU OVERVIEW

NOT SURE WHERE TO START?

Your MERS Benefit Education Specialist can work with you to create a customized and impactful presentation.

"I was very satisfied with the presentation. Lots of helpful information. Thanks!"

★★★★★

"The presenter was very informed and polite. She answered any questions myself and coworkers had."

★★★★★

"I was very impressed. I don't have a great deal of knowledge or understanding of the market – the session was extremely helpful."

★★★★★

MERS®
Municipal Employees' Retirement System

www.mersofmich.com

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Welcome to the myMERS app

- View account balance
- Access statements and tax forms
- Update beneficiaries
- Edit banking details
- Review contributions
- Calculate estimates
- And more

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