

Retirement Income Report

Pension Report and Gap Analysis

Prepared For:

Prepared By:

Date:

Monthly Income

CalSTRS Pension

Current Salary

Service Years

Age Factor

What This Means

It is the mission of Teachers Retirement Solutions (TRS) to strategically create partnerships with School Districts to provide education and resources to all classified and certificated staff by simplifying the, "complicated." When it comes to retirement planning TRS is a non-captive, multi-vendor consulting company that can tailor a 403b or 457 supplemental retirement plan based on every individual's needs & goals.

Next Steps With Melissa Ruiz



Based on today's conversation, we will:

- Review the information discussed during your appointment
- Be available to answer any follow-up question
- Provide guidance as you consider your retirement planning options

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