



# Retirement Income Review

Prepared By:

Date:

## Monthly Income

Additional monthly income needed from other sources

CalSTRS Pension

Current Salary

Service Years

Age Factor

## What This Means

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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 individuals needs & goals.

## Next Steps

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

No action is required at this time unless otherwise discussed during your appointment.

(866) 833 - 6113

[www.teachersrs.com](http://www.teachersrs.com)

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