



Amanda Hastings shares her story and the first time experience she had utilizing the free financial planning benefit provided by Stacey Braun Associates, Inc. and made available through the PEF Membership Benefits Program (PEF MBP).

OVERVIEW

Amanda Hastings had only been a PEF member for 2 years, when an unexpected financial gain came her way. Still early in her career, up to that point, Amanda had never consulted with a financial planner simply because she felt there wasn't enough money at her disposal to start planning. A change in circumstances, made her reevaluate as she pondered the tax implications headed her way. This prompted her to finally take advantage of the free financial planning program, a benefit of her union membership, provided by PEF MBP.

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WHERE TO START

Amanda was looking for someone who could give clear-cut and non-biased answers to her questions. She was looking to be heard and, as a financial planning novice, was seeking explanations that were on her level and easy to understand.

THE PROCESS

Amanda's free financial planning meeting with Stacey Braun Associates, Inc. was the first time she had met with a financial planner, and she described the staff as “very polite and not condescending”. “The appointment experience was wonderful. They answered my questions, heard what I had to say, and they explained things for beginners very well.”

EXPERIENCE

The most valuable aspect of what she learned during her meeting with the financial planner was gaining sound tax advice, as well as a basic understanding of marketplace fluctuations. As the financial world can be



ABOUT STACEY BRAUN ASSOCIATES, INC.

Stacey Braun Associates, Inc. was founded in 1977 for the primary purpose of providing asset management services to labor-management pension funds, union and corporate organizations, as well as individuals.

In 2001, Stacey Braun introduced the Financial Planning Division in response to a need for objective programs that would help the employees and union members of their institutional clients better comprehend their personal finances and help them attain their financial goals. A founding concept is that these services are offered in an unbiased fashion and without sales pressure. Today, Stacey Braun Associates, Inc. offers financial planning programs to over 600,000 participants in the tri-state area. Stacey Braun Associates take a fiduciary role and must prioritize their client's interests over their own.

In addition, Stacey Braun supports the PEF Membership Benefits Program by providing educational seminars and webinars for PEF members and retirees on a variety of financial planning topics.

affected, in part, by current events, natural disasters, politics, public perception, and more, the periodic review of one's financial plan is recommended. Amanda says she will be scheduling another appointment using the free financial planning benefit, "Soon!". She also cites the fact that the benefit and financial planners were "very helpful" as her main reason for recommending the program to other PEF members.

"They treat you as an individual, not a cookie cutter client basing everything off of your salary and your age," Amanda revealed. The information and recommendations provided by her advisor have positively impacted her wallet by helping to steer her in the right direction. She anticipates that the action she is taking will help to not only safeguard her finances, but to grow her money as well.

**Images are for illustration purposes only and do not represent the actual member.*

Stacey Braun

ASSOCIATES, INC.

TO MAKE AN APPOINTMENT

- ▶ Call Stacey Braun Associates: (888) 949-1925, or
- ▶ Email: info@staceybraun.com, or
- ▶ Visit Stacey Braun online: staceybraun.com
use the following log-in and password:
 - ▶ Log-in: nypef
 - ▶ Password: finance