

2024 PEF Annual Convention Extras of Great Value!



The 46th Annual PEF Convention is just around the corner and here is a listing of activities that you can take advantage of while you are there. Several of these activities require a reservation, so please review these opportunities to see what interests you, and make your reservation today!

Financial Planning Consultation Opportunities

Free, 30-Minute Financial Planning Consultation

Take advantage of the opportunity to meet with a Stacey Braun Certified Financial Planner to discuss your financial planning needs. Your 30-minute consultation can be used to discuss retirement planning, budgeting to get on the right path for a more financially secure future, investment planning to grow your wealth, tax planning, and more. Discuss whatever topic you desire to help secure a solid financial future.



Consultations will take place on Sunday, September 15 from noon to 6 p.m. or Monday, September 16 from 11 a.m. to 2 p.m.

To schedule your appointment, please email [Tiara Smiley](mailto:Tiara.Smiley@staceybraun.com), or call Tiara at (800) 767-1840, ext. 387. Be prepared to provide your name, email, phone number, and financial topic of choice. Stacey Braun Associates, Inc. will email you to confirm your appointment time and they will provide some paper work for you to complete and to bring with you to help guide the consultation.

Credit, Student Loan, or Debt Management Consultations

Free, 30-Minute Credit, Student Loan, or Debt Counseling Consultation

Don't miss this fantastic opportunity to take advantage of a credit, student loan, or debt management counseling session with a

nationally-certified counselor who will work with you to determine the most appropriate course of action for your specific situation.

A Student Loan Counseling Session:

Receive assistance with federal student loans and learn about options available to reduce payments or seek some debt forgiveness.



To prepare for a student loan consultation, please:

- 1) Review the options in advance.
- 2) Gather the answers to the following questions:
 - What type of loans do you have, Federal Family Education loans (FFELP), or Direct loans, issued through the William Ford Direct loan program?
 - What repayment plan are you paying through? (An income-based plan? The 30-year Standard Plan, etc.)
 - Have you used much forbearance or deferment time?

To prepare for a credit or debt consultation, please have an understanding of your:

- Outstanding credit card balances
- Outstanding debt beyond credit credit cards: any type of loan or debt owed
- Current income
- Monthly expenses: (i.e., mortgage, rent, phone bill, entertainment expenses, etc.)

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Voluntary Legal Service Plan Consultation or Questions

Learn how the Voluntary Legal Service Plan Serves as Your Personal Legal Team

Take advantage of the opportunity to meet with a representative from Feldman, Kramer & Monaco, PC Law Firm. Learn how you can obtain your key estate planning documents with the purchase of the plan. Learn more about the features of the Plan and how it can best serve your legal needs. Learn about the Elder Law Rider, about the creation of a Trust and more.



15-Minute Consultation/Question time slots will take place on Sunday, September 15 from noon to 6 p.m. or Monday, September 16 from 11 a.m. to 2 p.m.

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Flu Shot Clinic

Schedule Your Annual Flu Shot

Take the time to get your annual flu shot while at the convention and save yourself some time! Flu shots will take place:

Monday, September 16
10 a.m.–2 p.m.

PEF Convention Vendor Exhibit Hall

Use the QR code below to reserve your spot and be sure to visit the vendors when you're in the exhibit hall!



Convention Exhibit Hours:

Sunday, September 15 from Noon–6 p.m.

Monday, September 16 from 8 a.m.–6 p.m.

Tuesday, September 17 from 8 a.m.–11 a.m.

PEF Membership Benefits Program Trustees

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PEF MEMBERSHIP BENEFITS PROGRAM

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