



Ohio Public Employees Retirement System

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# **OPERS Educational Opportunities for Members and Retirees**

OPERS offers in-person seminars, interactive webinars and online recorded presentations designed to meet your needs and assist you in making retirement decisions.

Our education is updated regularly and tailored to your specific needs throughout your career. Please refer to your annual statement to find your retirement group prior to attending an in-person seminar or webinar. Knowing your retirement group will help you better understand how the information presented applies to you.

You are encouraged to take an active role and stay educated throughout your career so you can be prepared for retirement.

## **To Access or Register for Educational Opportunities**

You can register for a seminar by logging into your online account or by calling 1-800-222-7377. You can also register for a webinar, view a recorded presentation and see a complete schedule of educational opportunities at [www.opers.org](http://www.opers.org), under Educational Opportunities.

# How to Select a Retirement Plan

## *Starting your career*

This one-hour presentation educates you on how to select the OPERS retirement plan that helps you achieve your retirement goals. This is an important decision that will impact your financial future. As a new OPERS member you have 180 days from your start date to select one of the three OPERS retirement plans:

### **Traditional Pension, Member-Directed or Combined Plan.**

All three retirement plans have different features, so it's important you select the plan that best meets your needs and retirement goals.

### **Topics include:**

- Overview of plans
- How your pension is calculated
- Choosing your investments
- Comparison of plan features and benefits
- Retirement eligibility
- Tools to help you select your plan
- How to select your plan

# Education Today for Retirement Tomorrow

*Throughout your career*

This one-hour presentation is for OPERS members in the **Traditional Pension Plan** who are more than five years from retirement (Groups B and C). This presentation provides information and resources so you can take an active role in preparing for your retirement and make retirement decisions throughout your career.

## Topics include:

- Earning and purchasing service credit
- Disability and survivor benefits
- Retirement eligibility
- Early retirement reduced benefits
- OPERS health care - general information
- Educational tools and resources
- Social Security



## Ready to Retire Pension and Health Care

*As you approach retirement*

These two back-to-back, one-hour presentations are for OPERS members in the **Traditional Pension Plan** who are who are within five years of retirement eligibility (Groups A and B). During these presentations you will learn about the retirement application process and the tools and resources available to help you with your retirement decisions. You will also learn about important changes to Ohio retirement law and OPERS health care that may impact your retirement benefits.

### Topics include:

- Age and service eligibility for retirement and health care
- How retirement benefits are calculated
- A timeline for your transition to retirement
- Cost of Living Adjustment (COLA)
- OPERS health care
- The 2016 OPERS Medicare Connector
- Social Security

## Retiree Health Care

*In retirement for those under age 65*

This one-hour seminar discusses OPERS health care changes that will impact retirees through 2020. In addition you will learn about the OPERS Medicare Connector and your transition to an individual Medicare plan.

### Topics include:

- Overview of OPERS health care
- Overview of health care changes
- Overview of Medicare
- Transitioning to the OPERS Medicare Connector



## Recorded presentations

In addition to the presentations we offer, there are several recorded presentations available online at [www.opers.org](http://www.opers.org), under Educational Opportunities.

Topics include, but are not limited to:

### Members in the Traditional Pension Plan

- Re-employment
- Retirement Planner
- Retirement Checklist\*
- Refunding from the Traditional Pension Plan
- Viewing your Online Account\*
- Annual Statement
- Disability Benefits\*



## Recorded presentations

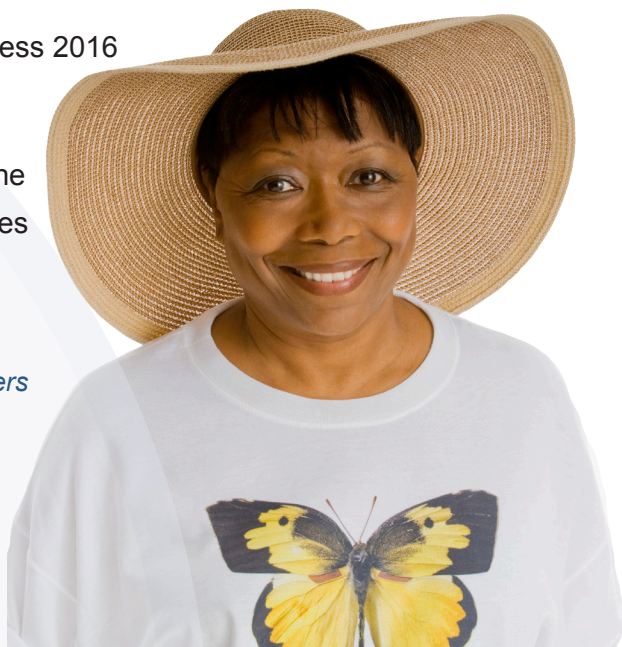
### Members in the Member-Directed Plan

- Retiree Medical Account
- Refunding From the Member-Directed Plan
- Changing Your Investment Options\*
- Self-Directed Brokerage Account\*

### OPERS Retirees

- How to Print a 1099 from your Online Account
- 2016 OPERS Medicare Connector
- Connector Readiness 2016
- Medicare Basics
- Your OPERS Online Account for Retirees
- Form 1099-R

*\*Also appropriate for members in the Combined Plan.*



## **Get education when and how you want it**

### **Seminars (in-person)**

Seminars provide a personal touch and the ability to ask questions. You can also benefit from listening to questions asked by other members who are in the same stages of their careers. You can talk briefly with an OPERS Educator after the seminar. Seminars are provided at locations around Ohio. We can also conduct seminars at your office—ask your HR representative to contact OPERS.

### **Webinars (live and interactive)**

Webinars provide the same presentations online. You can even type questions during a webinar and receive answers. In addition, you can learn by reading answers to questions from other participants.

### **Recorded Presentations**

Recorded presentations are available anytime online. They allow you to see most of our presentations when it is most convenient for you.



## **Employers**

### *Host an OPERS Member education event*

If you are an employer interested in hosting an OPERS member education event at your office, please have your HR representative complete an Educational Information Request available on [www.opers.org](http://www.opers.org), under Employers, Educational Opportunities, Employer Tools.



## Notes

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[www.opers.org](http://www.opers.org)  
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