Teachers Retirement System of Georgia

TRS Employer Event Guide

Everything You Need to Know About Hosting a TRS Event

Teachers Retirement System of Georgia

www.trsga.com

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Hosting an Event

Thank you for hosting an outreach event with the Teachers Retirement System of Georgia! We appreciate the opportunity to come to your location and meet with TRS members from your location and from locations nearby. Feedback from members who have attended our workshops and one-on-one counseling sessions has been overwhelmingly positive and we are sure that your experience for your attendees will be the same!

To make hosting an event easy and trouble free, we created this short outreach guide. **If you have questions regarding the information in this guide, please contact the Retirement Planner(s) listed on the Outreach Worksheet emailed to you. If for some reason you are not able to reach the Planner(s), please contact Mike Zarem at 404-425-6616 or mike.zarem@trsga.com.**

Please fully complete the TRS Event Worksheet. The information on this sheet will enable us to post your event on our web site so that members can register online for workshops and/or one-on-one counseling sessions. Please note that if we do not have all the information, your event can not be posted.

Steps for online member registration are included on the outreach promotional flyers, which you can use to promote the event within your location or school system. Simply type your event-specific information onto the applicable form, which is a .pdf file and then print the flyer for communication boards and/or email the flyers to your staff. **We recommend you promote the event as soon as you have received confirmation from TRS that the event is posted online.** Your event is posted to our web site so other TRS members who visit our site can register and come to your event. We also can schedule a second, follow-up event if you have an overflow of demand for one-on-one counseling sessions.

Members register online separately for workshops and for one-on-one counseling sessions, both of which are described in the following pages.

Presentations (Workshops)

Presentations (also known as workshops) are conducted by one of our Retirement Planners or the Communications Manager. The format is a PowerPoint show, which we try to keep fun and interesting by including two-way communications with members and passing out prizes. **Our Retirement Planners bring the following equipment: a laptop, projector, and extension cords. However, we do not bring a projection screen, so please have one available for your workshop event(s).**

If you already have presentation equipment in place at your location(s), we will be happy to use it if we can. Please have a media specialist available if you have sophisticated equipment, such as a sound room, special stage lighting, or not-so-obvious computer hook-up procedures.

A Typical Schedule for a Three Day Event:

Tuesday Workshop at 3:30 PM
(you provide the projector screen, we provide the laptop, projector, extension cords, etc.)

Wednesday Counseling from 8 AM to 4 PM
(ethernet or wireless connections needed)

Thursday Counseling from 8 AM to Noon
(ethernet or wireless connections needed)

As the host, you decide the best time to conduct the workshop and that's when TRS will be there for you. **The most common start time is 3:30pm to 4:00pm when the school day is over and when there is enough time for your staff to get from their school to wherever the workshop is held. When your workshop is part of our full, 3-day pre-retirement program, the workshop is typically held on a Tuesday, with counseling on Wednesday and Thursday.**

Workshop Types

We offer **new-hire, mid-career, and pre-retirement workshops** to address the needs of each group. We would be happy to conduct multiple workshops at your location to reach each audience, or you may decide to bundle everyone together for one presentation, if that meets your needs best.

New-hire workshops are for staff that are not vested yet, which means they have less than 10 years of service with TRS.

- The presentation typically lasts 45 to 60 minutes with questions and answers. If your agenda does not permit this length of time, we can squeeze it to 30 minutes, but this leaves out useful information for your attendees.
- Content includes basic TRS benefit information, the basics of retirement plans, how TRS fits into their overall retirement picture, and the basics of financial planning.
- **We focus on the value of having a TRS retirement benefit, with the goal of helping you retain your new teachers.**

Mid-career workshops are for staff with 10 to 20 years of creditable service with TRS.

- Presentations typically last 45 to 60 minutes with questions and answers.
- Content includes benefit basics and details on service purchases. Less time is spent on investment basics compared to new-hire show.
- **This workshop could be used if your attendees are in various career stages.**

Pre-retirement workshops are for staff within 5 years of retirement eligibility. Eligibility to retire occurs when a member has a minimum of 10 years of service and is at least 60 years old, or when the member has 30 years of service at any age.

- Presentations typically last 75 to 90 minutes with questions and answers.
- TRS offers this workshop as either a single outreach event or in conjunction with one-on-one counseling sessions where Retirement Planners come to your site and generate individual benefit estimates.
- **Content includes a description of options, service purchases, benefit calculations, beneficiary designations, retirement applications, and paperwork processing.**

Workshop Registration

Workshop online registration is a quick and easy process. **Staff must sign up for or have an existing TRS account to register for any of our workshop or counseling sessions. They may register or log in to their accounts at www.trsga.com. Further event registration details are available on the flyers. Please contact our Call Center for any technical log in/account difficulties.**

One-on-One Pre-retirement Counseling Sessions

TRS is pleased to make available one-on-one pre-retirement counseling sessions at host-employer locations. Members no longer have to drive into Atlanta for this service; however, TRS still offers counseling services in Atlanta (just north of downtown at Interstate 75 and Northside Drive). If a staff member wishes to make an appointment in our Atlanta office or schedule a phone session, please have them call and arrange a counseling session through our Call Center at (404) 352-6500 or (800) 352-0650.

Typically, counseling is offered as a component of a pre-retirement program that extends over a 3-day period. The first day, which is a normally a Tuesday, we conduct the pre-retirement workshop at the time you select. All day Wednesday and half the day on Thursday we would conduct counseling at the location(s) you designated on the TRS Event worksheet.

Note: If possible, we prefer that each Retirement Planner has a separate room in order to protect the member's privacy.

Counseling begins at the start of each hour and lasts up to 50 minutes per registered member. Wednesday sessions start at 8:00 am. If possible, Retirement Planners would like to meet with your event contact at 7:30 am on Wednesday to discuss logistics for counseling. A lunch break is scheduled on Wednesday from 1:00 pm to 2:00 pm and the last session begins at 4:00 pm. On Thursdays, we start again at 8:00 am, with the last session starting at 12:00 pm. This enables us to provide you with 26 one-on-one sessions in a typical program. If you need an alternative schedule, we can discuss options with you.

Counseling Registration

Counseling registration is an easy process. **Staff must sign up for or have an existing TRS account to register for any of our workshop or counseling sessions. They may register or log in to their accounts at www.trsga.com.** Further registration details are available on the flyers. Please contact our Call Center at (800) 352-0650 for any technical log in/account difficulties.

Once the counseling event is posted to the TRS web site, time slots are awarded on a first-come, first-served basis to eligible members. **Members must be within 5 years of retirement (25 years of service at any age OR age 55 and above) to be eligible for a counseling event.** The registration system automatically verifies a member's eligibility for counseling. Once a particular *time slot* is fully booked, the system will not offer that time slot to anyone else. Members who register will receive a system-generated, automatic email confirmation that lists the time and location of their counseling session. The system also allows members to cancel, which opens the time slot back up. Online registration closes five (5) business days prior to the scheduled date of the event.

During the registration process, a member can request up to two specific benefit estimates based on assumptions the member provides online. We capture the member's anticipated retirement date, anticipated service purchases and unused sick leave credit, as well as beneficiary information. During an actual session, the member may present alternative scenarios and we will generate additional estimates.

Things to know about the member registration process:

Once you log in under your account, you will only see the counseling events if you are within 5 years of retirement (25 years of service OR age 55 and above).

Pre-retirement Workshop registration is open to members within 10 years of retirement.

Once a member registers for an event it will no longer appear on their upcoming event list. It will appear under their "Registration History" Tab.

Registration Difficulties

If a member is having difficulties registering for a TRS Account, Counseling Session, or Workshop, please have them contact our Call Center at (800) 352-0650. A TRS representative will help them set up their account or let our IT department know of any technical issues. Please remind your staff that they must be eligible to register for a pre-retirement one-on-one session and that once registration closes for an event, it will no longer appear on the upcoming event list. Counseling registration usually closes 5 business days before the event and Workshop registration usually remains open until the day of the event.

Sessions for Members That Have Not Registered

An eligible member who has not registered for a session could be seen on a walk-in basis under the following circumstances:

- the event host maintains a list of members who want a walk-in appointment, which includes their name and a daytime contact number, preferably a cell phone number; and email address.
- the list is given to the Retirement Planners prior to sessions starting on the counseling sessions days, Wednesday and/or Thursday.

When these conditions are met, the Retirement Planner, time permitting, will place phone calls and offer a walk-in appointment, starting from the top of the list. If you permit, members on your list could wait in a designated common area for an available walk-in appointment, but the process needs to be controlled through the event host so that it's fair and so that sessions are not interrupted.

We would use this call list when any of the following occurs:

- a time slot remained open when online registrations closed
- a last-minute cancellation was received
- the registered member does not show up within 20 minutes of the scheduled start time

We regret that we are not able to properly counsel multiple members during any given 50-minute time slot.

We also appreciate your assistance in helping us to maintain a professional and well-managed event for your staff members. Walk-in members that we are unable to accommodate may register for another session at a later date, or they may schedule a visit to our Atlanta office. Also, counseling may be provided over the phone. Please contact our Call Center.

Information Technology Requirements for Counseling

For a successful counseling event, we have the following technical requirements:

1. **Ethernet connections (one or more). Retirement Planners bring laptops to your location and use them to access the TRS database using Ethernet connections.** These connections are high-speed Internet connections; they are common within school systems and other educational entities. Physically, Ethernet connections are like a phone jack in the wall, except that an Ethernet connection is wider. We will need one connection per Retirement Planner, which normally means we need two connections, preferably in two different rooms for privacy reasons.

2. **Wireless connections: if the Retirement Planners are not able to utilize Ethernet connections, they will need access to a wireless network.** This will require your IT department to configure the wireless connections on the Retirement Planners' laptops in order for them to be able to utilize the TRS database via the Internet. These wireless connections may be removed from the laptops by your IT staff, if required, prior to the Retirement Planner leaving the premises.

3. **Ethernet or Wireless Connections: Your firewall must be configured to allow the Retirement Planners to browse to https://citrix.trsga.org.** This only requires outbound port 443 to be open. Some IT departments only allow for a direct connection to the TRS website. If this is the case, please use the "NSLOOKUP" command to determine the current IP address of the website. This may change as needed.

   TRS is committed to the safety of your employees' personal information and will take all steps necessary to ensure the security of this information.

We look forward to coming out to your event! Again, thank you for being a host employer. Please fully complete the Event Hosting worksheet and then we can "get the show on the road!"

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