



NO TEACHER LEFT BEHIND.SM

PLAN TODAY. A BRIGHTER TOMORROW.

Age 25
First Year Teacher

Lesson Plans
Grading
Parent Emails
So Many Dreams
♡



Same Teacher.
Same Passion.
A Brighter Tomorrow.

YOUR FUTURE MATTERS TOO.

Age 60
Ready for
What's Next

More Time
More Freedom
More Adventures
Still Making
a Difference
♡

Different
Chapter.
Same
Purpose.
♡



You Take Care of Everyone Else.
It's Time Someone Had Your Back.



UNDERSTAND
WHAT YOU HAVE



IDENTIFY
WHAT'S MISSING



EXPLORE
YOUR OPTIONS



BUILD YOUR
BRIGHTER TOMORROW

EDUCATORS DESERVE A
CLEARER, BRIGHTER FUTURE.

TeacherRetirementReportCard.com →

KNOW MORE. PLAN SMARTER. LIVE BRIGHTER.

Why Teachers Get Left Behind

Teachers spend their careers preparing everyone else for the future. Too often, no one helps them prepare for their own.

The problem isn't that teachers don't care about retirement. It's that the system often leaves them with important financial decisions, a pile of options, and no clear process for putting everything together.

01

YOU'RE EXPECTED TO FIGURE IT OUT

Pension rules, 403(b)/457 plans, insurance, district benefits, Social Security and family goals all have to work together - but teachers are often left to connect the dots on their own.

02

TOO MANY SALES PEOPLE PUSHING PRODUCTS

The guy who brought lunch never to be seen again, or the advisor selling high-fee plans for their benefit, not the teacher. Teachers deserve unbiased guidance, real education, and a plan built around their goals - not someone else's commission.

03

THE RELATIONSHIP OFTEN ENDS TOO SOON

Retirement planning should not be a one-time meeting. Careers change. Families change. Markets change. Goals change. A plan needs someone willing to stay, review it, and adjust with you.

04

THE TRUTH CAN SHOW UP TOO LATE

Many educators don't know what retirement will really look like until the finish line is close. Then the fun decisions - travel, family, freedom, what's next - can become hard financial decisions.

The question we want every teacher to be able to answer:

When do I want to retire? How much income will I have?

Am I actually on track to make that happen?

How We Help Teachers & Families

A simple five-step process: understand the situation, educate first, improve what matters, stay connected, and pay it forward.

T

TAKE INVENTORY & DEFINE THE GOAL

First, we figure out where you are, where you want to go, and whether anything is standing in the way.

We ask questions and look at your complete picture - pension, retirement accounts, benefits, protection, income, family priorities and retirement goals. The goal is to determine whether there is actually a gap, concern or opportunity to address. Ultimately: when do you want to retire, how much income will you have, and are you on track?

E

EDUCATE

Once we understand where you stand, we help you understand what you have and what your options are.

We make the complicated simple. We walk through the pieces, explain what they mean, and give you the context to make informed decisions. Education comes before recommendations.

A

ALIGN & BUILD

If something needs to change, or if there is a way to improve your situation, we will tell you.

We ask: can we help you get where you want to go better, faster, safer or more efficiently? If yes, we show you what we would change and why. If no, we'll tell you that too. The goal isn't to change something - it's to improve something.

C

CONTINUE TOGETHER

Your life will change. Your plan should be able to change with it.

We stay connected, conduct regular reviews, measure progress, and adjust as your career, family, finances, goals and retirement timeline evolve. We're not here for one appointment. We're here for the journey.

H

HELP ANOTHER TEACHER

If we've helped you, help us make sure another educator isn't left behind.

Introduce another teacher, school employee, friend or family member who deserves the same opportunity for clarity. One teacher helping another is how the mission grows.

T: Do we have a problem? E: Do you understand it? A: Can we improve it?

C: Are we staying on track? H: Who else can we help?

Three Teachers. Three Spotlights. Every Month.

Taking a small step for your future self and family deserves to be celebrated.

Each month, we select three educators who complete their Teacher Retirement Report Card and schedule a complimentary Pension & Retirement Review. There is no 1st, 2nd or 3rd place - three teachers are celebrated.



CLASSROOM IMPACT SPOTLIGHT

Up to \$1,000

Classroom Wish List or Sponsored School Event



SCHOOL COMMUNITY SPOTLIGHT

Lunch for Your School Staff



TEACHER APPRECIATION SPOTLIGHT

\$100 Starbucks eGift Card for You

+ \$100 to Gift Another Educator

HOW TO BE ELIGIBLE

Take one small step for your future.

Complete your Teacher Retirement Report Card at TeacherRetirementReportCard.com and schedule your complimentary Pension & Retirement Review. That's it. A few minutes today can create greater clarity for your future self and your family.

Start With Clarity. Build From There.

The Teacher Retirement Report Card is the starting point - not a sales pitch.

STEP ONE

Complete Your Teacher Retirement Report Card

It helps organize the key pieces of your retirement picture and gives us a starting point for the conversation. From there, schedule your complimentary Pension & Retirement Review so we can answer the questions that matter most: when do you want to retire, how much income will you have, and are you on track?

TeacherRetirementReportCard.com

THEN: PAY IT FORWARD

Help One. Reach One. Change a School.

If the T.E.A.C.H. Process helped you gain clarity or confidence, introduce us to another educator who deserves the same opportunity. There is no pressure and no obligation. You're simply opening the door for someone else to get educated, ask questions, and understand their options.

One teacher helps another. That's how No Teacher Left Behind grows.

Educate. Build. Stay. Pay It Forward.

Somebody should have your back. Now somebody does.

No Teacher Left Behind

Same Passion. A Brighter Tomorrow.

Age 25
First Year Teacher

YOUR FUTURE MATTERS TOO.

Age 60
Ready for What's Next



25 YEARS
LATER...



- ✓ Excited for the journey
- ✓ Making a difference
- ✓ Building a career
- ✓ So many dreams ahead

- ✓ A career well spent
- ✓ Financially confident
- ✓ More time for what matters
- ✓ Excited for what's next



**NO TEACHER
LEFT BEHINDSM**
PLAN TODAY. A BRIGHTER TOMORROW.

You've spent your career preparing others for the future.
Now it's time to make sure you're prepared for yours.

Same calling. A brighter tomorrow.

THE T.E.A.C.H. PROCESS

A BETTER WAY TO HELP TEACHERS & FAMILIES



TAKE INVENTORY & REFINE THE GOAL

We start by understanding your complete financial picture so we can create clarity. When do you want to retire? How much income will you have? Are you on track?



EDUCATE

We make the complicated simple by helping you understand what you have, your options, and any gaps or opportunities. Education comes before recommendations.



ALIGN & BUILD

If something needs to change, or if there's a way to improve your situation—we'll tell you. Can we help you get where you want to go better, faster, safer, or more efficiently? If the answer is yes, we'll show you how. If not, we'll tell you that too.



CONTINUE TOGETHER

Your life will change. Your plan should be able to change with it. We stay connected, conduct regular reviews, and make adjustments as your career, family, finances, goals, and retirement timeline evolve.



HELP ANOTHER TEACHER

If we've helped you, help us make sure another educator isn't left behind. One teacher helps another teacher—and together we can create a bigger impact.

Educate.
Build. Stay.
Pay It Forward.

Monthly Teacher Spotlight

Each month, we select three teachers who complete their Teacher Retirement Report Card and schedule a complimentary Pension & Retirement Review.

Taking this step is a small investment in your future self and your family — and we want to celebrate you for it!

THREE TEACHERS. THREE SPOTLIGHTS. EVERY MONTH.



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You help shape the future.
We help your classroom.



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Lunch for
Your School Staff



Good
Teachers
Build Great
Communities.



TEACHER APPRECIATION SPOTLIGHT

\$100 Starbucks eGift Card
for You + \$100 to Gift
to Another Educator



Because great teachers
lift up other teachers.



**GET YOUR TEACHER
RETIREMENT REPORT CARD**

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Your
Future
Matters.