NEA RETIREMENT SPECIALISTS

About us

Vetted by NEA Member Benefits, Hawaii NEA Retirement Specialists provide planning and advice for your retirement needs. Our goal is to help you stay on track so that you can retire on time and achieve the lifestyle you've always desired for your retirement years. Based on your current financial goals and future retirement needs, we will develop a comprehensive financial plan for you. We will review your investment options, as well as help you determine how to help you analyze your income sources, such as ERS Pension and Social Security benefits, so that you can have clarity as you prepare for retirement.

NEA RETIREMENT Member Benefits

Consultation for Retirement Planning
- Do I have enough to retire?
- When can I retire?
- If anything should happen to me, how can I make sure my family is covered?

ERS Estimates
- How do I know which ERS pension option is best for me?
- How much will my pension be?

Social Security Optimization
- How do I make the most of my Social Security benefits?
- When is the best time to take out Social Security?

NEA endorsed 403(b)'s
- How does my 403(b) compare to the NEA 403(b)?
- Does my 403b meet my needs?

Portfolio Reviews
- Is my portfolio too aggressive, too conservative or just right?

Advice on Budgeting
- How do I make a budget and plan accordingly?

OFFICE LOCATIONS

Honolulu
1585 Kapiolani Blvd, Suite 928
Honolulu, HI 96814

Hilo
116 Hualalai Street, Suite 100
Hilo, HI 96720

We also meet virtually or by phone

808-951-7185

info@shiraishifinancialgroup.com

http://www.shiraishifinancialgroup.com/nea-retirement-program-0

NEA Retirement Seminars and Webinars

403(b)'s for the New Educator
This seminar covers the basics of investing and different types of 403b’s offered in the State of Hawaii DOE, as well as the questions you should be asking of your financial advisor.

All About 403(b)'s and Management
This seminar covers the different types of 403b’s offered in the State of Hawaii DOE, as well as the questions that you should be asking of your financial advisor, and the differences between Strategic (passive) management and Tactical (active) money management.

Are You on Track to Retire?
This seminar is geared to members in their 50’s-60’s and will focus on getting ready for retirement. We will discuss the State of Hawaii ERS pension and Social Security. In addition, we will cover retirement projections, various investment vehicles, the importance of the catch-up provision, risk tolerance and long-term care insurance. We will also include an introduction to Estate Planning (wills, trusts, probate, and legacy planning).

Maximizing Social Security
This seminar covers the basics and rules behind Social Security. We will discuss topics such as: 1) why the Social Security filing decision matters, 2) how to manage the Social Security decision and determine the right filing strategy, and 3) how to integrate the Social Security decision into a comprehensive retirement plan.

Planning Your Financial Journey
This seminar is geared to members in their 20’s-30’s. It begins with an introduction to the State of Hawaii ERS pension and Social Security Benefits. We will focus on setting financial goals, budgeting, learning about various investment vehicles, the importance of investing early, and an introduction to insurance. We will also cover which teachers might be eligible for the Student Loan Forgiveness Program.

NEA Member Benefits Webinars

NEA MB: Maximizing Your Paycheck-Utilizing Member Benefits
Make the Most of Your Union Membership. As a member of NEA you have access to 75+ programs and services developed specifically for members to save them time and money. Please join us to learn how to access these benefits via www.neamb.com/start and START saving now. All members welcome.

NEA MB: Navigating Student Debt
Navigating the Student Loan Forgiveness Quagmire. Your union is working on several fronts to help with the student loan debt crisis in this country. We want to help you on a personal level to better understand these programs and to move you forward toward forgiveness. Please join us to learn the facts about the current federal loan forgiveness programs (including some of the changes currently becoming effective as part of new stimulus bill) and to gain access to the NEA Member Benefits Loan Forgiveness Navigation tool available at www.neamb.com/start. Members with current federal loans welcome. Student members may also be interested.