



CANADIAN COUNCIL *of* CHRISTIAN CHARITIES
ADVANCING MINISTRY TOGETHER

Ready to Retire

Definition and Terms (for the use of Benefit Coordinators)

WHO

All members of the CCCC Pension Plan getting ready for retirement.

WHEN

Within 6 months of your retirement date and ready to discuss with an expert.

WHY

It's your responsibility to decide how to convert your life savings into retirement income.

WHAT

Financial guidance regarding the conversion of your pension assets into retirement income.

...AND

Assistance in completing forms or paperwork required to implement your decision.

...FINALLY

Act as a liaison between you and the financial institution when required.

HOW

Two hours of personalized one-on-one consultation with an independent investment expert.

...AND

Objective, conflict-free guidance and support within the context of your plan assets.

IMPORTANT

This service is provided by the CCCC Pension Plan at no cost.

WHO IS PROTEUS?

Proteus has worked with the CCCC Pension Plan since 2001 and has developed a strong relationship by providing plan governance consulting support to the Board of Trustees and staff. Proteus is privately-owned and maintains no affiliations with investment management firms, insurance companies, or plan custodians.

Get the support you need today.

Contact Proteus directly at:

READYTORETIRE@PROTEUSPERFORMANCE.COM