

## ROSE Training Presentations

**PERS** - Oregon PERS (Public Employees Retirement System) is Oregon's retirement plan for public employees, offering a pension, an Individual Account Program (IAP) for savings, and optional plans, providing income for retirees through defined benefit (pension) and defined contribution (IAP) components, with different tiers (Tier 1, Tier 2, [OPSRP](#)) based on hiring dates. This workshop gives a little background on how PERS was established, the different components, eligibility requirements, and the steps a member would take to apply for their PERS pension.

**Duration:** 30-45 minutes

**Target audience:** Any school district employee within 5 years of retirement

**Presentation:** Virtual (via Zoom) or in-person

**Equipment:** PC, a projecting/display device (in-person)

**Handouts:** PDF to be provided to hosting unit for reproduction as necessary

**Social Security** – Social Security is a U.S. government program providing financial support through retirement, disability, and survivor benefits, funded by payroll taxes. This presentation reviews what social security is, the different types of benefits, how it is funded, eligibility for retirement, and how to apply.

**Duration:** 15-20 minutes

**Target audience:** Anyone considering retirement

**Presentation:** Virtual (via Zoom) or in-person

**Equipment:** PC, a projecting/display device (in-person)

**Handouts:** PDF to be provided to hosting unit for reproduction as necessary

**Medicare** - Medicare is the U.S. federal health insurance program for people 65+, younger people with certain disabilities, and those with End-Stage Renal Disease (ESRD) or Lou Gehrig's disease, providing coverage through Original Medicare (Parts A & B), Medicare Advantage (Part C), and prescription drug plans (Part D) to help with costs like hospital stays, doctor visits, and medications. This presentation reviews what Medicare is, eligibility requirements, how to enroll and provides an overview of the different parts to Medicare.

**Duration:** 15-20 minutes

**Target audience:** Anyone nearing age 65

**Presentation:** Virtual (via Zoom) or in-person

**Equipment:** PC, a projecting/display device (in-person)

**Handouts:** PDF to be provided to hosting unit for reproduction as necessary

**ID Theft and what you can do** – ID theft occurs when someone steals personal information—such as a name, Social Security number, or credit card details—to commit fraud, such as opening unauthorized accounts, stealing tax refunds, or obtaining medical services without permission. This crime can severely damage credit scores, result in financial loss, and lead to wrongful criminal charges. This presentation provides

an overview of what identity theft is, the different types of theft, how thieves get information, best practices of things to avoid, proactive measures that anyone can take, and how to recover from theft.

**Duration:** 15-20 minutes

**Target audience:** Anyone

**Presentation:** Virtual (via Zoom) or in-person

**Equipment:** PC, a projecting/display device (in-person)

**Handouts:** PDF to be provided to hosting unit for reproduction as necessary

**Estate Planning 101** - Estate planning is the process of creating a strategy for managing and distributing your assets, finances, and healthcare decisions during your life, in case of incapacitation, and after your death, using legal documents like wills, trusts, and powers of attorney to ensure your wishes are followed, minimize taxes, and provide for loved ones. This presentation reviews the benefits of estate planning and goes over six key steps to prepare your estate.

**Duration:** 20-30 minutes

**Target audience:** Anyone

**Presentation:** Virtual (via Zoom) or in-person

**Equipment:** PC, a projecting/display device (in-person)

**Handouts:** PDF to be provided to hosting unit for reproduction as necessary

**What To Do When A Loved One Dies** - Losing a loved one can be one of life's most difficult experiences. Whether expected or unexpected, it's never easy. In addition to the emotional weight of grief, you're often faced with urgent decisions and logistical tasks you may not feel prepared for. Knowing what to do after someone dies—both immediately and in the weeks and months that follow—can bring clarity during an otherwise disorienting time. This presentation reviews the 11 required and recommended steps that need to be completed upon death of a loved one.

**Duration:** 20 minutes

**Target audience:** Anyone

**Presentation:** Virtual (via Zoom) or in-person

**Equipment:** PC, a projecting/display device (in-person)

**Handouts:** PDF to be provided to hosting unit for reproduction as necessary

**Introduction to ROSE** – This presentation is an overview of ROSE, eligibility, ROSE structure, communications, benefits of being a ROSE member, eligibility and membership process, what ROSE does, and how ROSE can help a chapter.

**Duration:** 10-15 minutes

**Target audience:** Anyone planning to retire

**Presentation:** Virtual (via Zoom) or in-person

**Equipment:** PC, a projecting/display device (in-person)

**Handouts:** PDF to be provided to hosting unit for reproduction as necessary