



Retired or Retiring in the next few years?

Retirement planning is personal; every plan member is unique. The advisors at HUB International are here to provide guidance that is specific to your situation in the final years as you approach retirement, and transition to life after work.

How can we help?

Investment Options

We can review and recommend any changes to your investment portfolio to ensure you are invested in an appropriate manner as you move towards drawing income out of your plan and beyond.

Income Illustrations

We can provide illustrations that will help you understand how much income you can reasonably draw from your plan without leaving yourself short later in life.

Government Benefits

We can discuss your options in regard to the government benefits you will be eligible for, and help you decide when best to start receiving them.

Provide Financial Peace of Mind

Investing for your future can be complicated and sometimes overwhelming. We can help you make the most of your UA516 Savings Plan, reduce your financial stress and help you be better prepared for and in retirement.

Start the conversation by emailing myretirement@hubinternational.com or by calling 1.800.518.4247. Please mention that you are a Refrigeration Workers Union retirement plan member.

