



RetireeFirst

Unlocking Retirement Benefits for Union Members

Presented by:

**Carl Pecoraro – Cleveland Bakers and
Teamsters Pension Fund**

**Michael Fina – Union Labor Advisory
Network**

Gian Ricchezza – RetireeFirst

Matt Zerr – RetireeFirst

Webinar will begin shortly.

October 25, 2023



Carl Pecoraro

Cleveland Bakers and Teamsters
Pension Fund

Introduction: Carl Pecoraro

- Fund Chairman at Cleveland Bakers and Teamsters Pension Fund
- Leads a team in overseeing a pension fund and health and welfare fund for active and retired employees
- Has worked with Teamsters Local 507 for over 43 years, with 40 years working directly for the Union as an officer and business agent
- Under his leadership, active and retired members receive rich healthcare benefits and education on building their financial assets at a young age through retirement



Michael Fina

Union Labor Advisory Network
(ULAN)

Introduction: Michael Fina

- Financial executive and founder of Union Labor Advisory Network (ULAN)
- 15+ years in banking industry
- Developed client network focused on supporting Labor Union benefit funds
- Consults with Labor leaders on financial technologies and banking services
- Oversees ULAN as a site to support, educate, and promote Union Labor community



Matt Zerr

RetireeFirst

Introduction: Matt Zerr

- Director of Member Engagement at RetireeFirst
- Leads Wellness Team in addressing gaps in member healthcare
- Proactively educates retirees on carrier-sponsored wellness programs
- Team partnered with carriers to launch House Calls
- Significant impact in ensuring retirees' good health and wellness outcomes



Gian Ricchezza

RetireeFirst

Introduction: Gian Ricchezza

- Chief Business Officer and Co-Founder at RetireeFirst
- Oversees strategic initiatives – new markets, partnerships, and company organizational structure
- Most recently, led the long-term planning, execution, and grand opening of RetireeFirst West in Arizona to better serve West Coast and Midwest-based members

Union Membership and Retirement Benefits



Maximizing Benefits for Post-65 Retirees



Navigating the Rising Costs of Retirement



Dispelling Myths and Enhancing the Retiree Experience



RetireeFirst

Thank you!

Connect with us on LinkedIn:



Carl Pecoraro · 2nd
President at International Brotherhood of Teamsters Local 507

International Brotherhood of Teamsters Local 507



Michael Fina (He/Him) · 2nd
Executive Director - Skilled Trades Advocate - ULA Network Advisory Board Member

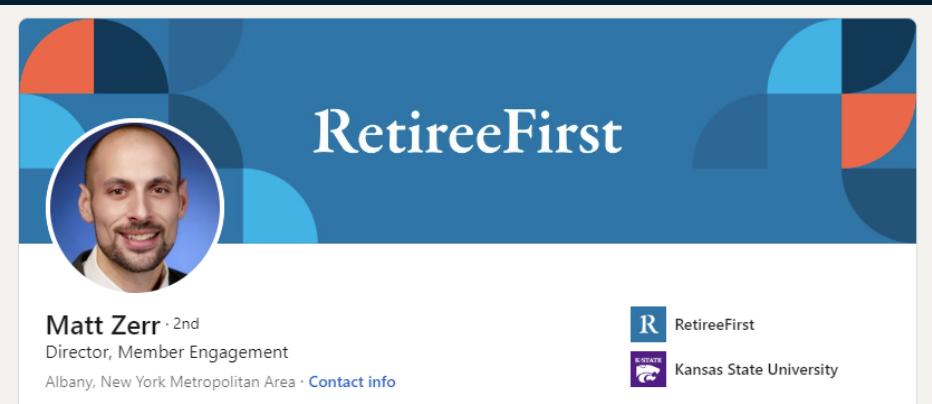
ULA Union Labor Advisory Network
St. John's University



Preserving Retiree Healthcare.
Ensuring Peace of Mind.

Gian Ricchezza · 1st
Chief Business Officer at RetireeFirst

RetireeFirst
Rutgers, The State University



Matt Zerr · 2nd
Director, Member Engagement

Albany, New York Metropolitan Area · [Contact info](#)

RetireeFirst
Kansas State University



Audience Questions

Resources



- [RetireeFirst.com](#): Client case studies, videos, blogs, news, and more
- [Case Study: Cutting Costs, Not Care. How a Pension Fund Preserved its Retiree Health Plan](#)
- [Video: A Trusted Partnership with Cleveland Bakers and Teamsters](#)
- [ULANetwork.com](#): Industry updates, videos, interviews, and more