

# Testimonies

## By NASCOE Members



*Dillard*  
Financial Solutions, Inc.  
Smarter Retirement Strategies



## **Brandon J. Wilson, KASCOE Member**

“With fewer opportunities for benefits training in the workplace, the NASCOE/Dillard Financial benefits and retirement training was a good opportunity for me to evaluate my benefits and retirement. You should ask your state association to schedule a NASCOE/Dillard benefits and retirement training in your state very soon, so you can evaluate your benefits and retirement before it’s too late.”

## **Ron Wyckoff, KASCOE President**

Dillard Financial Solutions provided benefits and retirement training in March of 2014, for members of the Kansas Association, KASCOE. There were two sessions held in Kansas, one for each half of the state. There was great attendance at each session with approximately 60 members and spouses in attendance. The sessions were held on a Saturday with a meal was included. We were able to offer this training to our members free of charge with the generous donation of \$500 for each session from Dillard Financial Solutions. There was a lot of positive feedback from those who attended. It is definitely a presentation that would benefit all age groups, meaning if you have retired, ready to retire, thinking about retiring or just getting started, they do give everyone good information, all that attended learned something, and were presented with things to think about in their planning. KASCOE is working on the possibility of having them back to Kansas to provide additional sessions for our members.

## **Jennifer Dutton, WYASCOE President**

WYASCOE, in conjunction with the Wyoming State FSA Office, hosted a retirement training provided by Dillard’s Financial Solutions in October 2015. Dillard’s representatives were very helpful and informative. We had so many people sign up for individual consultations that they decided to bring a second representative to accommodate all those who wished to participate. WYASCOE received many positive comments about the presentation and consultation. We will host another retirement training in the future! We appreciate Dillard’s support of our association.

## **Amy Hackler, TASCOE Member**

Dillard Financial provided my spouse and I a wonderful overview of what we needed to plan for and do to enjoy our retirement years. It was a great one on one experience for us and they were able to schedule us on a Sunday morning to fit our busy schedules. I really had a wonderful experience and would recommend to anyone.

## **Liz Ludwig, MNASCOE President**

On behalf of MNASCOE members in Minnesota, I want to extend my most sincere gratitude for your willingness to educate all of us about our NASCOE benefits. Because of your presentations and resulting one-on-one meetings, our members are better positioned to be financially secure in retirement. Fortunately (or unfortunately, depending on how you look at it) our members are realizing that a comfortable retirement is attainable sooner than some expected. I’ve talked with about 30 employees since the meetings and have heard a lot of positive feedback. I’ve also heard

some astonished members that are having a hard time believing that such a good, safe product is available. Many members did not understand that your products are a specific “benefit of NASCOE membership”. Currently, many individuals are thinking of setting up a follow-up appointment with you and their spouses. I’ve encouraged them to do so. I’m excited about our collective financial futures! Again, thank you for your work and commitment to our membership. It is greatly appreciated!

### **Jennifer Garcia, TASCOE Member**

I can’t say enough about the good our retirement session has done. The more current crop of hires planning a federal career need to hear what Dillard Financial Services is saying; while seasoned veterans, nearing retirement, hung on every word. There were quite a few one-on-one sessions planned for Saturday. I spoke to the employee who met with them on Sunday, with his spouse. He said it was more than they are able to discuss when they’ve met briefly with a large audience, like at TASCOE. Every situation is unique and the one-on-one helps tailor to our own needs. This employee and his wife will start implementing some changes for their family. DFS has stated they will not only get us to retirement, but walk us through the time that follows. It is not too late for an employee to make some changes that will benefit themselves, no matter where you are on your personal time line. Overall – very pleased with our session.

### **Comments from Attendees at Falfurrias, TX Workshop**

- “First, I want to thank all that helped in arrangements for this meeting. It was a very enlightening meeting. I learned much about my finances and retirement date.
- The Dillard’s were very informative and very helpful with all the information in the meeting. They assured me that if I had any questions at all about retirement or finances that they would be willing and glad to help out in any way they can.
- They definitely left me with a more comfortable feeling about my finances and upcoming retirement, whenever that may be.
- All questions were answered or addressed. I was glad to hear that it was at no cost to us. Our one on one meeting went very well and my husband got his questions answered. As I get closer to my planned retirement date, I’m sure we will have additional questions and will be calling them.

### **Linda Holland, MNASCOE Member**

I was impressed with presentation. Lots of options to think about, you were very helpful in answering questions. You also are going to be there for us when retiring.

### **Abby Goff, MNASCOE Member**

Lots of great info! I look forward to visiting with you guys in the future. I am 25 and this is my first “grown up” job, so I’m learning about benefits, etc., all for the first time. I think it would be beneficial to have sessions separated by what stage of your life/career you are in. Thanks again!

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## Jake Bourget, WASCOE President

To all the presenters at the meeting, as WASCOE President representing the members of WASCOE, I want to extend a sincere "Thank You". There is a small sense of accomplishment when you have someone that is close to retirement tell you they are glad they came as they understand they have a lot of options to look into to prepare for the big step, and when you have someone that has been aboard for less than two years say they were glad they came realizing they need to get on the ball preparing for their future, we've done a little bit of something right. It's just too bad instead of 65, we couldn't get 265 at a meeting like this. Again, you made a great impression and I thank each and every one of you for your input last Friday, let's do it again!

**Please Provide your Testimonies?**  
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