



Want to meet with a Certified Financial Planner?

Bill Eagan, CFP®, of ICMA-RC is available to meet with BART ICMA-RC participants. Bill is at BART headquarters on a monthly basis and is available for individual consultations.

Appointments are made in advance with Bill and last approximately 45 minutes. Times are every hour on the hour starting at 9:00 am; the last appointment is at 4:00 pm.

Frequently discussed items are asset allocation, retirement planning, estate planning, insurance planning, educational expense funding, as well as other financial areas of interest.

Bill Eagan

CERTIFIED FINANCIAL PLANNER™

Bill's second quarter schedule is:

- Thursday, April 1, 2010
- Thursday, May 6, 2010
- Thursday, June 3, 2010

To make an appointment with Bill, call him directly at 510-249-9233, or send him an email at beagan@icmarc.org.

This is a no charge service available to all BART employees and retirees who are ICMA-RC participants.

ICMA-RC does not offer specific tax or legal advice. These presentations are offered for investment education purposes only and are not to be construed or relied upon as investment advice. It is recommended that individuals consult with their personal financial advisor prior to implementing any financial or tax strategy.

Certified Financial Planner Board of Standards Inc. owns the certification mark Certified Financial Planner™ in the U.S.