



Pension Education Council of Atlanta President's Letter – 2023

PECA Members and Sponsors:

This year is PECA's fifth year of supporting retirement plan professionals of the greater Atlanta metro. I am so humbled to be writing this President's Letter, proud of all we accomplished in 2022, blessed in the relationships I have gained through our organization, and excited for our future.

PECA was born around a core mission, helping retirement plans and their professionals succeed. This is a mission I'm extremely passionate about, and not just because of my chosen career path. It's because I have seen the power of well-run retirement plans and proper planning that allowed my dad to retire with excitement versus terror.

Millions of Americans count on our industry every day to help them build their nest egg for when they have to retire. This moment can be exciting or terrifying. And as we work hard to better ourselves and retirement plans through education and partnership with one another, we're helping all those Americans have a brighter future. A brighter outcome.

Our board is excited to continue to support you in 2023 in helping create those "brighter futures" through your important work. In 2022, with the gracious support of our sponsors and your membership, we provided virtual and in-person continuing education to help you grow as professionals in your knowledge and relationships. 2023 is getting kicked off right with the passing of SECURE 2.0.

Be prepared for PECA to bring lots of meaningful content in 2023. We are looking forward to sessions around SECURE 2.0 and with the DOL. As well, we'll look to bring a session focused on professional development, with content throughout the year being provided in virtual, in-person, and recorded on-demand format to support your success.

Those who know me would say I am always up for a new adventure, a new idea, and always striving to create something better for the next to come.

So, here's to an exciting 2023 together. Let's fill it with fun learning opportunities, new ideas, and continue to create a retirement plan world through our work that's better for those next to come.

Cheers to a bright 2023!

Katie Green
President, Pension Education Council of Atlanta 2023-2024
Vice President – Sales, Charles Schwab



PENSION
EDUCATION COUNCIL
OF ATLANTA



***Thank you to our 2022 Board Members rotating off the board this year!
Your contributions were monumental to PECA's planning and success!***

Joanne Pecina – Continuing Education VP
Lee Swerdlin – Board Member
Debra Carpenter – Board Member
Ilene Ferenczy – Board Member

Thank you to our 2023 Sponsors, as we couldn't do this without your generous support!

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2023 Board Members:

Heather Bailey – Board Member
Alison Cohen – Secretary
Chelsea Deppert – Board Member
Lindsey Dolbeer – Continuing Education VP
Alvaro Galvis – Community Relations Committee VP
Katie Green – President
Candace Jackson – Treasurer
Joni Jennings – Board Member (Past President)
Evan Melcher – Board Member
Anne Morris – Board Member
Shawn Slemmons – Technical Committee VP
Nick Westmoreland – Board Member
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