

# Retirement Planner Catale Honored for Volunteer Efforts

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Brian Catale didn't set out to win any awards.

"We saw a need and we filled it," he said.

The financial and retirement planner who heads Brian Catale & Associates of New Castle was honored last week with the UPMC Senior Services Caregiver Award.

For the past 10 years, Catale has volunteered his time and talents to help senior citizens, particularly senior veterans and their families and survivors to navigate the often-complex paperwork required to collect aid and attendance benefits through insurance and retirement plans as well as the U.S. Department of Veterans Affairs.

UPMC last week recognized individuals who help to make the lives of seniors easier at the annual UPMC Senior Services "Celebrating Senior Champions" dinner at the Omni William Penn Hotel in Pittsburgh.

Many of the people Catale helps are confused by the paperwork.

“A lot of the time, they’re also in mourning and they just don’t want to be bothered by all the things they have to go through to get the benefits due to them,” he said. “That is where we can help out.”

Catale said his firm, which specializes in estate and retirement planning, are not attorneys, but they work with area lawyers when the need arises.

He said he became aware of the need when members of his own family faced the puzzling paperwork and didn’t know where to turn. After sorting things out for them, he said, he started to get calls from social workers asking for his assistance. He said he was glad to do what he could.

“We do this at no charge for the veterans and their families,” he said.

Sometimes, Catale notes, these survivors remember him when the time comes for their own retirement planning. Over the years, many he has helped call him for assistance with their own lives. “We help them and for this we charge a fee for the service. We all benefit.”

Catale has been assisting individuals to plan for their retirement for the past 15 years. He also provides advice on gas well leases.

The Senior Services Honors is awarded to individuals who improve the lives of seniors in western Pennsylvania.

Others recognized by UPMC for Senior Services Honors include Dr. Charles F. Reynolds III, an internationally renowned expert in geriatric psychiatry recognized for his ongoing research and advocacy. He is a professor in Geriatric Psychiatry at the University of Pittsburgh School of Medicine and director of the UPMC Aging Institute who researches mood, grief and sleep disorders in later life. The Pittsburgh Foundation, the oldest and largest community foundation in America, was recognized for its support of local at-risk seniors, their caregivers and for research to treat Alzheimer’s disease and dementia.

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