

Bring More Value to Your Department Meeting

Free financial education presentations
for your faculty and staff

UC's financial education classes help you and your staff get the most from the UC Retirement Savings Plans—the 403(b), 457(b), and DC Plans. Now, I can tailor a presentation to fit your department meeting.

FITS YOUR BUDGET

- Classes are free
- Presented by Retirement Planners dedicated to UC and permanently located in your area

FITS YOUR SCHEDULE

- If you have 30 minutes or 3 hours, we can tailor a presentation to fit the time available
- Scheduling is easy—just contact me and book a room

FITS YOUR AGENDA

- Classes can help you meet your training and development goals
- I'll present the topics that best suit your faculty and staff

“An exemplary and convenient class—no small feat given our varying schedules and levels of knowledge. Many employees spread the word to others on staff and continued on to make a financial plan.”

– UC San Francisco

LEARN MORE

For a list of classes and schedules visit myUCretirement.com/classes

Let's Work Together!

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Retirement Planner

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Financial Education Presentations Tailored to Your Time and Needs. Free.

UC OFFERS COMPREHENSIVE BENEFITS. DO YOU KNOW HOW THEY WORK?

YOUR UC RETIREMENT SYSTEM

Introduction to your UC Retirement System—the UC Retirement Plan (UCRP) and the UC Retirement Savings Program: the 403(b), 457(b); and DC Plan.

THE UC RETIREMENT CHOICE PROGRAM

Learn about your retirement benefit options, understand how to make your choice and get answers to your questions.

GETTING STARTED IN THE UC RETIREMENT SAVINGS PROGRAM

Details on how UC'S voluntary retirement benefits program helps support other sources of retirement income. Learn about plan features, investment options and how to enroll.

BUILDING AN INVESTMENT PORTFOLIO USING YOUR INVESTMENT STYLE

GUIDE TO INVESTING IN THE UC RETIREMENT SAVINGS PROGRAM

Basics of investing, overview of funds available through the Retirement Savings Program, and investment approaches based on risk tolerance, investing horizon and involvement level.

QUARTERLY MARKET UPDATE (WEBINAR ONLY)

In-depth review of current market trends and factors affecting recent market performance.

WHETHER YOUR SAVINGS GOALS ARE BIG OR SMALL, YOU'LL NEED A GOOD PLAN TO GET THERE

IDENTIFY AND PRIORITIZE YOUR SAVINGS GOALS

Effective tips and strategies to help you save for the things that are important to you, like building an emergency fund, paying off student loans, buying a home, saving for retirement and more.

Investing involves risk, including risk of loss.

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WOMEN AND INVESTING SERIES: ORGANIZE, PLAN, OWN YOUR FUTURE

Designed for women - Learn ways to build healthy financial habits, save for multiple goals, and invest wisely, so that you can take control of your financial future.

CREATING A BUDGET, DITCH YOUR DEBT, AND START BUILDING FOR THE FUTURE

What you need to know about budgeting, debt and making room for saving.

COLLEGE SAVINGS OPTIONS

Introduction to saving for college, including planning guides and available tools.

PRESERVING YOUR SAVINGS FOR FUTURE GENERATIONS

Introduction to key tools for estate planning, including strategies for gifting and insurance replacement.

THINKING ABOUT RETIREMENT? WHAT TO DO NOW

MAKE THE MOST OF THE UC RETIREMENT SAVINGS PROGRAM

Determine how much savings you will need to retire the way you want, understand how much you can save through the UC Retirement Savings Program, discover additional ways to save, and learn strategies to help you protect and grow your savings.

STRATEGIES FOR DRAWING INCOME IN RETIREMENT

How to best plan for the retirement you envision by building a retirement income plan, including strategies for drawing income in retirement from different sources.

FUNDAMENTALS OF RETIREMENT INCOME PLANNING

Introduction to key concepts, considerations, and resources for determining when you are ready to retire.

BASICS OF WHEN AND HOW TO CLAIM SOCIAL SECURITY

How Social Security works and things to consider when deciding when and how to claim your benefit.

MAXIMIZE SOCIAL SECURITY IN YOUR RETIREMENT STRATEGY

Review of how Social Security works and ways to maximize benefits under different scenarios and priorities.