

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

Let's Work Together!

LEARN MORE

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

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

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

YOUR UC RETIREMENT SYSTEM

Overview of UC retirement benefits, including primary retirement benefit options and additional voluntary savings opportunities through the 403(b), 457(b) and DC plans.

THE UC RETIREMENT CHOICE PROGRAM

How the Retirement Choice program works, including details on the Pension and Savings Choice options, what to consider, and instructions on how to make your choice.

GETTING STARTED IN THE UC RETIREMENT SAVINGS PROGRAM

How UC's voluntary 403(b), 457(b) and DC plans can help you save more for retirement, including the benefits of pre-tax saving, and how to enroll.

BUILDING AN INVESTMENT PORTFOLIO USING YOUR INVESTMENT STYLE

GUIDE TO INVESTING IN THE UC RETIREMENT SAVINGS PROGRAM

How to build an investment strategy based on risk tolerance, investing horizon and involvement level, and the investment options available through UC's 403(b), 457(b) and DC plans.

QUARTERLY MARKET UPDATE (WEBINAR ONLY)

Financial market update for the most recent quarter.

Investing involves risk, including risk of loss.

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

IDENTIFY AND PRIORITIZE YOUR SAVINGS GOALS

How to balance saving for retirement with other savings goals such as paying off student loans, home purchase or college savings.

WOMEN AND INVESTING: ORGANIZE, PLAN, OWN YOUR FUTURE

Learn simple steps you can take to build healthy financial habits, save for multiple goals and invest wisely.

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

Tips and tools to help you get a handle on spending and borrowing, including how to develop a smart budget and ways to manage debt.

YOUR COLLEGE SAVINGS OPTIONS

Insight into the rising cost of college, financial aid resources and how to start saving now.

PRESERVING YOUR SAVINGS FOR FUTURE GENERATIONS

How an estate plan can help you preserve your assets and control the distribution of your estate. Covers wills and probate, power of attorney, healthcare proxies and gifting and insurance replacement strategies.

THINKING ABOUT RETIREMENT? WHAT TO DO NOW

FUNDAMENTALS OF RETIREMENT INCOME PLANNING

Understanding when you may be able to retire, ways to help make your savings last, and retirement challenges you may face.

BASICS OF WHEN AND HOW TO CLAIM SOCIAL SECURITY

Understand how Social Security works and what you should consider before you claim your benefit.

MAXIMIZE SOCIAL SECURITY IN YOUR RETIREMENT STRATEGY

Learn about strategies for claiming your Social Security benefit and how it fits with other income sources to create your retirement paycheck.

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