

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

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

This class is for members who became eligible for the Retirement Choice Program after July 1, 2016, to learn about your retirement benefit options, understand how to make your choice and get answers to your questions.

GETTING ON THE RIGHT PATH WITH YOUR UC SAVINGS PLAN

Introduction to UC Retirement Savings Program benefits, features, and investments.

BUILDING AN INVESTMENT PORTFOLIO USING YOUR INVESTMENT STYLE

BUILDING A PORTFOLIO FOR ANY WEATHER

How to diversify your investments across asset classes to help maximize returns and minimize risks.

WOMEN AND INVESTING SERIES SESSION 2: BUILD AND OWN YOUR PLAN

Introduction to investing, including how to build a plan for investing your personal and retirement savings.

QUARTERLY MARKET UPDATE (WEBINAR ONLY)

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

Investing involves risk, including risk of loss.

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

DESIGNING YOUR FINANCIAL ROADMAP

How to build a financial roadmap that can help you navigate all your savings needs.

WOMEN AND INVESTING SERIES SESSION 1: GET ORGANIZED

How to build healthy financial habits for women, including how to create a budget and build a debt/savings strategy.

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

FUNDAMENTALS OF RETIREMENT INCOME PLANNING

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

WOMEN AND INVESTING SERIES SESSION 3: RETIREMENT INCOME PLANNING ON YOUR OWN

Introduction to key retirement planning concepts for women, including estimating how long your money may last and preparing for challenges you may face in retirement.

MAKING THE MOST OF SOCIAL SECURITY

Understand the key factors that affect your monthly Social Security payment and the payment strategies available to you.

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