



# RETIREMENT & FINANCIAL EDUCATION

Sponsored by Human Resources, the retirement education series is a financial and retirement education program designed to help employees manage their resources and address their financial needs for a life-time of well-being.

Join in the 1<sup>st</sup> one-hour session on March 24th

Tucson: MCR -11:30 am (MST)

Boulder: Room W312-A 12:30 pm (MDT)

Gemini: Lecture Hall 8:30 am (HST)

Chile: TBD 3:30 pm (CLST)

Sunspot: Visitor's Center 12:30 pm (MDT)

or connect via Zoom at: <https://gemini.zoom.us/j/3488581838> or IP Address 162.255.37.11 meeting ID 348 858 1838

**All employees are encouraged to attend!**

Date	Topic	Presented by	Details
March 24 <sup>th</sup>	Retirement & Social Security	Lovitt & Touche	Social Security: What is it? How do you qualify? How much will you get? What's changing?
April 21 <sup>st</sup>	So, You're Thinking About Retirement?	Lovitt & Touche	Things to consider before retirement.
May 19 <sup>th</sup>	Women & Investing	Fidelity Investments	Facts about women in today's economy and some of the challenges women face when it comes to saving for retirement.
June 16 <sup>th</sup>	Inside Money: Managing Income & Debt	TIAA-CREF	How to help make money work, the importance of cash flow and how to use it, saving and spending, good and bad debt and ways to help manage it.
July 21 <sup>st</sup>	Medicare	Brown & Bishop	Navigating the alphabet soup of Medicare
August 18 <sup>th</sup>	Roth 403(b)/Tax-Free Options	Fidelity Investments	Is the Roth option right for me?
September 15 <sup>th</sup>	Estate Planning	Lovitt & Touche	What's it all about? Why do I need it?
<b>October</b>			
November 17 <sup>th</sup>	Designing Your Financial Roadmap	Fidelity Investments	How to create a financial plan and how to save for other long and short term goals you may have in addition to retirement.
December 15 <sup>th</sup>	The Starting Line: Why & How	TIAA CREF	The importance of planning early, maximizing retirement plan contributions, how a sound understanding of asset allocation principals affects the management of individual financial objectives.