

HUMAN RESOURCES
Spring into Financial Wellness!
Retirement Seminar for UH Faculty and Staff
M.D. Anderson Library, Elizabeth D. Rockwell Pavilion
Friday, April 5, 2024; 9:00 AM – 3:45 PM

SESSION SCHEDULE AND DESCRIPTIONS:

9:00 AM – 9:45 AM, Social Security 101

For most Americans, Social Security is essential for retirement. Join the Social Security Office for a special presentation to learn more about Social Security and how it can benefit you when you retire. Included will be eligibility information for retirement, survivors, spousal and Medicare benefits.

10:00 AM – 10:45 AM, TIAA: Make the Move toward Long-term Financial Security

Most people wonder whether they're saving enough for retirement. Well, that depends on a few things, not least of which is what you want your retirement to be. **During this midcareer retirement check-in**, discover the keys to successful money management, how to juggle competing financial demands and retirement saving strategies for lifelong financial security.

11:00 AM – 11:45 AM, Fidelity: What Is Financial Wellness and Why Is It Important

Being well prepared to handle any financial crisis, that's financial wellness. Learn how to prioritize your needs and wants, so you can pay today's bills while saving for your future goals. Fidelity representatives can help show you how to uncomplicate your financial picture and make meeting your saving goals easy. Attend this session to become more confident about your investing and future planning decisions.

LUNCH BREAK

12:00 PM – 12:45 PM

1:00 PM – 1:45 PM, Voya: Personal Finance Basics

Day to day financial decisions make a great deal of difference in the kind of life you want to lead, so it's important to learn how to manage your money in a common sense way. Discover the basics of personal finance, including how to set up a budget to see where your money goes, where to keep your money, how to handle what you owe, when investing makes sense and what tools and resources can help you.

2:00 PM – 2:45 PM, Corebridge Financial: Pathfinder to Financial Wellness

Look at how TRS, ORP, Social Security, and voluntary 403(b) contributions come together with our financial planning tool. Retirement Pathfinder can show a projection of what your financial picture could look like in retirement. Are you on track? Attend this workshop if you're new, mid-career, or about to retire. It will provide a helpful roadmap to financial wellness for all!

3:00 PM – 3:45 PM, TexaSaver 457(b): Ready, Set, Retire

This presentation will describe how the TexaSaver 457 (b) plan fits into the retirement income picture of faculty and staff by helping them to fill the income gap that no longer having a salary creates. The TexaSaver voluntary retirement savings program can increase your personal retirement savings to bridge that financial gap as well as weather inflation and things like increased medical expenses as you age.

PLEASE JOIN US. ADD THE SESSIONS TO YOUR CALENDAR AND PLAN NOW TO ATTEND!