



# 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 Program—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 consultants dedicated to UC and permanently located in your area

*"An exemplary and convenient workshop—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

## 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

Let's work together!

Learn more ►

For a complete catalog of available classes, visit [www.ucfocusonyourfuture.com](http://www.ucfocusonyourfuture.com)



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

## Plan Your UC Future ▶

### *Classes to Explore*

- 101 Your UC Retirement System**  
Introduction to UC retirement and savings benefits
- 201 Getting on the Right Path with Your UC Savings Plan**  
Overview of the UC Retirement Savings Program benefits, features, and investments
- 301 Accessing Your Account Online**  
Online tools for managing UC Retirement Savings Program investments

## Build Your Financial Foundation ▶

### *Classes to Explore*

- 101 Designing A Financial Roadmap**  
Introduction to planning and saving for multiple financial goals
- 201 Understanding the Power of Debt**  
Key concepts about debt, including your credit rating and how to trim your debt
- 301A College Savings Options**  
Vehicles for college savings plus planning guides and available tools
- 301B Establishing and Maintaining Your Estate Plan**  
The importance of preparing an estate plan and tools to help you get started

## Manage Your Investments ▶

### *Classes to Explore*

- 101 Building A Portfolio for Any Weather**  
The role of asset allocation and diversification in choosing investments
- 201 Remaining Confident in A Challenging Market**  
How market conditions affect investment performance and how to put market events in perspective
- 301 Quarterly Market Perspective**  
Current market trends and the most recent quarter's market performance

## Get Ready to Retire ▶

### *Classes to Explore*

- 101 Preparing Your Savings for Retirement**  
How to plan for your income and expenses in retirement
- 201 Shifting from Savings to Spending**  
Portfolio withdrawal rates and ways to turn assets into income, plus asset allocation in retirement
- 301 Preserving Your Savings for Future Generations**  
Key tools for estate planning, including strategies for gifting and insurance replacement

Keep in mind that investing involves risk. The value of your investment will fluctuate over time and you may gain or lose money.

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