



Reminder – Retirement Counseling Resources

Human Resources would like to remind you that Theron Lyon, a dedicated retirement and Certified Financial Planner (CFP) is available to meet with faculty and staff who are interested in receiving individual pre-retirement counseling and financial planning. You will be able to schedule an appointment directly with Mr. Lyon through **June 30, 2016**. If you would like to schedule an individual counseling session with Mr. Lyon, please contact him by email at theron.lyon@ucr.edu or by telephone at (951) 827-3562.

Individual financial planning is also available throughout the year. You may schedule a face-to-face meeting by contacting Diana Law, Fidelity Workplace Planning and Guidance Consultant (PGC) by telephone at (619) 372-2340 or by email at diana.law@fmr.com. For more information on the UC Retirement Savings Program offered through Fidelity Investments, visit myucretirement.com or contact Fidelity's customer service phone center at (866) 682-7787.

UCR continues to offer retirement services and tools to assist faculty and staff in career-long financial planning and planning for retirement on the [Human Resources](#), [UCNet](#), and [Fidelity](#) websites. If you need assistance or have questions in relation to your individual University of California Retirement Plan (UCRP) including estimates, retirement profiles, and election options, we encourage you to contact [UC Retirement Administration Service Center \(RASC\)](#) at (800) 888-8267, Monday – Friday, 8:30 a.m. – 4:30 p.m.

The following retirement resources are available for you to view on the UCNet website:

1. Preparing for Retirement Video Presentation: <http://ucnet.universityofcalifornia.edu/compensation-and-benefits/retirement-benefits/preparing-for-retirement-presentation/index.html>.
This presentation provides an overview of your UC retirement benefits, examples of retirement benefits calculations, and information about what you need to do to retire from UC. It consists of 8 brief modules. The full presentation lasts about 60 minutes, but you can also easily view those specific sections that interest you.
2. UCRP Website: <http://ucnet.universityofcalifornia.edu/compensation-and-benefits/retirement-benefits/ucrp/>.
3. [A Complete Guide to UC Retirement Benefits](#).
4. [Retiree Benefits Factsheet](#).

If you have any questions, please contact Benefits at benefits@ucr.edu.