Planning for the Future is a four-part series developed to provide useful information on how to plan for a successful and satisfying retirement. Topics covered include: UC Retirement Benefits, the development of a Living Will, Standard Will and a Living Trust, the UC Retirement Savings Plan, and the overall fundamentals of retirement income planning for early career employees.

UC Retirement Benefits
September 30 / 11:00 a.m. – 1:00 p.m. / HUB 302 North
Learn the basics of the UC Retirement Plan (UCRP), how retirement income is calculated and options for survivors. Receive information on retirement election decisions and the retirement process.

Retirement Administrative Service Center (RASC)
⇒ Jackylyn Wong, RASC
⇒ Donald Goldberg, RASC

UC Retirement Benefits Webinar
If you are not able to attend the UC Retirement Benefits Workshop, you are welcome to join this webinar - Space is Limited.

December 1 / 11:00 a.m. - 1:00 p.m.
⇒ Click here to enroll

Life / Estate Planning
October 15 / 11:00 a.m. – 1:00 p.m. / HUB 355
Receive guidance and information about the importance and benefits of having a Living Will, Last Will and Testament and a Living Trust. Learn how to properly develop and execute these life planning documents.

ARAG Group (Allgemeine Rechtsschutz-Versicherungs-AG)
⇒ John Morkos, Morkos Law Group
⇒ Click here to enroll

Retirement Readiness
Department workshops are available upon request
Receive an introduction to UC retirement & savings benefits, an overview of the UC Retirement Savings Program benefits, features, and investments, and step-by-step guidance in using the Personalized Retirement Roadmap tool. For more information, please click here.

Fidelity Investments
⇒ Contact Jeffrey Crowley, Fidelity Retirement Counselor, at jeffrey.crowley@fmr.com to request a department workshop.

Retirement for Early Career Employees
November 12 / 11:00 a.m. – 1:00 p.m. / HUB 355
Learn strategies designed to help you reach your financial goals including: rebalancing your portfolio and steps to put your plan in motion.

Fidelity Investments
⇒ Jeffrey Crowley, Fidelity Retirement Counselor
⇒ Click here to enroll

benefits@ucr.edu