

New Employee

Financial Planning & Retirement Orientation

October 1 | December 3

Conducted via Zoom



10:00 Health Care Facilitator Program

Ranada Palmer – Health Care Facilitator

10:15 California Casualty

Charlene Rowens – California Casualty Representative

10:30 ComPysch – Faculty & Staff Assistance Program

Lexi Stahler – ComPysch Account Representative

10:45 Faculty Staff Wellness Program

Jacqueline Lesley – Wellness Program Specialist

11:00 Fidelity Investments

Matt Vallejo – Retirement Planner

11:45 Altura Credit Union

Jonathan Paredes – Credit Union Representative

12:00 Schools First Federal Credit Union

Diana Barragan – Credit Union Representative

Registration: [UC Learning Center \(LMS\)](#)

- Join Zoom Meeting: <https://ucr.zoom.us/j/3318564136>
- Meeting ID: 331 856 4136
- Dial by your location:
(669) 900 6833 US (San Jose) | (253) 215 8782 US (Tacoma)