



# Pre-Retirement Planning Workshop

Wednesday, February 3, 2021

The UC Contracted Retirement Experts and the UCR Benefits Office will be providing a *virtual* overview of the pre-retirement process for all faculty and staff, including reviewing a checklist of items required to be prepared to retire.

## Agenda

10:00 a.m. : Introduction – Benefits Office

10:10 a.m. : California Casualty

10:20 a.m. : Fidelity Investments –

Fidelity provides 1:1 financial counseling

10:30 a.m. : Emeriti/Retirees' Association

11:00 a.m. : Benefits Office – *ends at 1:00 p.m.*

## Zoom

[Join the Virtual Meeting](#)

Meeting ID: 904 147 3038

(669) 900-6833

To view the Pre-Retirement Planning workshop series, visit the [Pre-Retirement Planning Workshop Series webpage](#).