

2022 UW SRP Annual Benefits Enrollment Event Schedule

| Week 1 (September 27-30) | |
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| Thursday, September 29 11:00 AM | <p>LIVE: Investing in your Financial Future Introduction to the UW Supplemental Retirement Program (SRP)</p> <p>Presented by: Fidelity Investments Format: <i>Live Zoom 45-minute session</i> Description: In this workshop, you will learn how the SRP could help supplement your retirement income, why you may want to save more for retirement and how to get started on the path to your healthy financial future.</p> |
| Friday, September 30 1:00 PM | <p>LIVE: Market Volatility & Retirement</p> <p>Presented by: TIAA Format: <i>Live session</i> Description: It's natural to worry about your retirement funds during turbulent times, no matter where you are on the path to retirement. With high inflation, continued conflict in Ukraine, and ongoing market volatility, even the savviest investor can get concerned. The good news is your TIAA retirement plan was built knowing times like these happen.</p> |
| Week 2 (October 3-7) | |
| Tuesday, October 5 1:00 PM | <p>LIVE: Investing in your Financial Future Introduction to the UW Supplemental Retirement Program (SRP)</p> <p>Presented by: TIAA Format: <i>Live Zoom 45-minute session</i> Description: In this workshop, you will learn how the SRP could help supplement your retirement income, why you may want to save more for retirement and how to get started on the path to your healthy financial future.</p> |
| Thursday, October 6 10:00 AM | <p>LIVE: Investing for Beginners</p> <p>Presented by: Fidelity Investments Format: <i>Live Zoom 30-minute session</i> Description: In this Building Your Financial Foundation workshop, we'll introduce you to the world of investing—the basic terms and concepts used as well as different investing styles.</p> |
| Week 3 (October 10-14) | |
| Tuesday, October 11 Noon | <p>LIVE: Investing in your Financial Future Introduction to the UW Supplemental Retirement Program (SRP)</p> <p>Presented by: Fidelity Investments Format: <i>Live Zoom 45-minute session</i> Description: In this workshop, you will learn how the SRP could help supplement your retirement income, why you may want to save more for retirement and how to get started on the path to your healthy financial future.</p> |
| Thursday, October 13 3:00 PM | <p>LIVE: Looking to Turn Your Retirement Savings into a "Paycheck" for Life?</p> <p>Presented by: TIAA Format: <i>Live session</i> Description: You diversify your investment portfolio before retirement to help offset risk. A similar strategy can help see you through retirement. Learn how creating a diversified income plan can help reduce the risks you may face in retirement and ensure you have income that never runs out.</p> |
| Week 4 (October 17-21) | |
| Monday, October 17 4:00 PM | <p>LIVE: Investing in your Financial Future Introduction to the UW Supplemental Retirement Program (SRP)</p> <p>Presented by: TIAA Format: <i>Live Zoom 45-minute session</i> Description: In this workshop, you will learn how the SRP could help supplement your retirement income, why you may want to save more for retirement and how to get started on the path to your healthy financial future.</p> |
| Thursday, October 20 10:00 AM | <p>LIVE: Learn the Basics of When and How to Claim Social Security</p> <p>Presented by: Fidelity Investments Format: <i>Live Zoom session</i> Description: Learn how Social Security fits your retirement paycheck, identify Social Security claiming strategies, and create your retirement income plan.</p> |
| On-demand Workshops | |
| <p>Investing in your Financial Future: Introduction to the UW Supplemental Retirement Program (SRP) <i>If you miss the live session, you can watch this 15-minute, on-demand seminar at a time that works for you. Learn how the SRP could help supplement your retirement income, why you may want to save more for retirement and how to get started on the path to your healthy financial future.</i></p> | |
| <p>Making Sense of Medicare Learn how and when to enroll, Medigap and Medicare Advantage plans, and Parts A, B & D.</p> | |
| <p>Strategies for Student Loan Debt Listen as speakers discuss strategies for student loan debt.</p> | |
| <p>Keeping Your Personal Information Safe Find out how to protect yourself from threats to your personal information.</p> | |
| <p>Charting your course: A financial guide for women Women can face unique financial challenges. You can discover tailored approaches to saving for retirement and tips to make your money work hard.</p> | |
| <p>Within Reach: Transitioning from career to retirement You can plan ahead to help make the most out of your retirement—from paying yourself to allowing for taxes, healthcare and estate planning wishes.</p> | |
| <p>The Starting Line: Beginning to save for your ideal retirement You can learn how to evaluate and manage debt, find additional ways to save, create a budget and begin to plan for retirement.</p> | |

| Independent Study | |
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| <p>Live Web Workshops Live, interactive sessions conducted online by a licensed representative</p> | <p>Fidelity: Register for a Live Event TIAA: Register for a Live Event</p> |
| <p>Webcasts Empowering conversations with experienced panelists</p> | <p>Fidelity: Watch on Demand TIAA: Watch on Demand</p> |
| <p>Tools, Articles and More Log in and get started</p> | <p>Fidelity: www.NetBenefits.com TIAA: www.tiaa.org/public/learn</p> |