For Department Benefits Representatives

If you would like to schedule a Retirement Readiness meeting for your department at your location, please send an email message to our UCSF/Fidelity Retirement Services Representative at the following address:

UCSFmeetings@fmr.com

Current topics include:

**Enrolling in Your UC Retirement Savings Program**
- Learn about the benefits of your Retirement Savings Program
- Determine how much you may need in retirement
- Learn about the Investment Options available in the program
- Learn how to enroll in the plan
- If you are already enrolled, are you on track?

**Achieving a Sound Retirement**
- Learn how to create a retirement income plan
- Identify retirement expenses including medical expenses
- Determine sources of retirement income
- Recognize the need for wills, trust, powers of attorney, and emergency funds

**Finding the Right Investment Strategy**
- Understand asset allocation and diversification
- Recognize the characteristics of the three asset classes
- Identify your appropriate target asset mix based on your personal situation
- Learn how and when you may need to adjust your mix going forward

These presentations are sponsored by the University of California. All workshops run approximately 60 minutes. If you would like a different topic covered than those listed above, please note that in your email.

Include in your email request:
- Contact name, phone number, department
- Location of the event
- Preferred date and time of meeting (include alternate dates)
- Type of audience (e.g., faculty, staff, post-docs, etc.)

Your department should be prepared to:
- Reserve the classroom/conference room space
- Provide audio/visual equipment (laptop, projector, screen)
- Publicize the event to faculty and staff in your department (10 or more attendees preferred)