

Fidelity Retirement Services Presentation 2009 Schedule by Month Quarter 3 - 4

JULY

Wednesday, July 1 at 12:00 pm – 2:30 pm, RRUCLA Room 3-3102 [Enrolling/Determining]
Tuesday, July 21 at 12:00 pm – 1:00 pm, RRUCLA Room 6-6234 [Achieving / Help Desk 7:30-11:30am]
Wednesday, July 22 at 12:00 pm – 1:00 pm, Wilshire Center Suite 410 [*NetBenefits*]
Friday, July 24 at 12:00 pm – 1:00 pm, Wilshire Center Suite 445 [Enrolling]

AUGUST

Tuesday, August 4 at 12:00 pm – 2:30 pm, RRUCLA Room 8-8234 [QMP/Enrolling]
Wednesday, August 12 at 12:00 pm – 1:00 pm, Wilshire Center Suite 410 [*NetBenefits*]
Tuesday, August 25 at 12:00 pm – 1:00 pm, RRUCLA Room B-120 [Determining / Help Desk 2:00-6:00pm]
Thursday, August 27 at 12:00 pm – 1:00 pm, Wilshire Center Suite 410 [*NetBenefits*]

SEPTEMBER

Thursday, September 10 at 12:00 pm – 1:00 pm, Wilshire Center Suite 410 [*NetBenefits*]
Wednesday, September 16 at 12:00 pm – 2:30 pm, RRUCLA Room 3-3102 [Determining/Achieving/helpdesk 3:00-6:00pm]
Tuesday, September 15 at 12:00 pm – 1:00 pm, Wilshire Center Suite 445 [QMP]

OCTOBER

Tuesday, October 6 at 12:00 pm – 1:00 pm, Wilshire Center Suite 410 [*NetBenefits*]
Tuesday, October 13 at 12:00 pm – 2:30 pm, RRUCLA Room 3-3102 [Taking Charge/QMP]
Wednesday, October 14 at 12:00 pm – 1:00 pm, Wilshire Center Suite 410 [*NetBenefits*]
Thursday, October 29 at 12:00 pm – 1:00 pm, RRUCLA Room B-120 [Determining / Helpdesk 7:30-11:30am]

NOVEMBER

Tuesday, November 10 at 12:00 pm – 2:30 pm, RRUCLA Room B-124 A&B [Achieving/QMP /Helpdesk 3:00-6:00pm]
Friday, November 13 at 12:00 pm – 1:00 pm, Wilshire Center Suite 410 [*NetBenefits*]
Monday, November 16 at 12:00 pm – 1:00 pm, Wilshire Center Suite 445 [Determining]

DECEMBER

Friday, December 4 at 12:00 pm – 1:00 pm, Wilshire Center Suite 410 [*NetBenefits*]
Tuesday, December 8 at 12:00 pm – 2:30 pm, RRUCLA Room B-124 A&B [Enrolling/Determining]
Tuesday, December 15 at 12:00 pm – 1:00 pm, RRUCLA Room B-120 [Enrolling / Helpdesk 7:30-11:30am]

Fidelity Retirement Services Presentation 2009 Schedule by Topic Quarter 3 - 4

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?

Workshop Dates

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Tuesday, October 13 at 12:00 pm – 1:00 pm, RRUCLA Room 3-3102
Tuesday, December 8 at 12:00 pm – 1:00 pm, RRUCLA Room B-124 A/B

Achieving a Sound Retirement

- Learn how to create a retirement income plan
- Identify retirement expenses including medical expenses
- Determine sources of retirement income including Medicare and Retirement Savings Program distribution options
- Recognize the need for wills, trust, powers of attorney, and emergency funds

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Tuesday, December 15 at 12:00 pm – 1:00 pm, RRUCLA Room B-120

Finding the Right Investment Strategy (previously called Determining)

- 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

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Tuesday, December 8 at 1:30 pm – 2:30 pm, RRUCLA Room B-124 A&B

NetBenefitsSM – All classes will be held at the Wilshire Center Computer Room

- Understand Fidelity Retirement Service online account access system, available virtually 24 hours a day
- See how you can log on any time to access your account and manage your portfolio
- Learn how to use the system to help you get ready for retirement

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Thursday, August 27 at 12:00 pm – 1:00 pm, Wilshire Center Suite 410
Thursday, September 10 at 12:00 pm – 1:00 pm, Wilshire Center Suite 410
Tuesday, October 6 at 12:00 pm – 1:00 pm, Wilshire Center Suite 410
Wednesday, October 14 at 12:00 pm – 1:00 pm, Wilshire Center Suite 410
Friday, November 13 at 12:00 pm – 1:00 pm, Wilshire Center Suite 410
Friday, December 4 at 12:00 pm – 1:00 pm, Wilshire Center Suite 410

Quarterly Market Perspective

- Have a better understanding of current market trends
- Review the most recent quarter's market performance
- Discuss economic topics

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Tuesday, November 10 at 1:30 pm – 2:30 pm, RRUCLA Room B-124 A&B

HELPDESK at RRUCLA Dining Commons

Tuesday, July 21 at 7:30 – 11:30 am
Tuesday, August 25 at 2:00 – 6:00 pm
Wednesday, September 16 at 3:00 pm – 6:00 pm
Thursday, October 29 at 7:30-11:30am
Tuesday, November 10 at 3:00 pm – 6:00 pm
Tuesday, December 15 at 7:30-11:30am