The path to retirement, while exciting and full of promise, can sometimes be unexpectedly bumpy. In partnership with UCLA’s Campus Human Resources (CHR), the UCLA Emeriti/Retirees Relations Center (ERRC) is pleased to offer a new three-part workshop series to help UCLA staff navigate the road to this next life chapter. These workshops are designed for staff who are within five years of retirement:

1. **UC Retirement Plan and Retiree Health Benefits** (Friday, January 12, 9 a.m. – noon or 1:30 – 4:30 p.m.)
2. **Preparing Financially for Retirement** (Friday, January 19, 9 a.m. – noon or 1:30 – 4:30 p.m.)
3. **Work/Life Transitions** (Friday, January 26, 9 a.m. – noon or 1:30 – 4:30 p.m.)

You are encouraged to register for all three classes, however if you have already taken CHR’s “Planning Your UC Retirement” workshop, you do not need to register for session #1. Click here to register for the workshops (search for “Path Forward”) and choose the morning or afternoon sessions.

For questions about registration, please contact CHR’s Hazel Chun at hchun@hcr.edu. For questions about the curriculum or other general questions, contact Sue Barnes, director of the UCLA Emeriti/Retirees Relations Center, at sbarnes@errc.ucla.edu.

**#1: UC Retirement Plan and Retiree Health Benefits** (Friday, January 12, 9 a.m. – noon or 1:30 – 4:30 p.m.)
(Those who are unable to attend this session can view a webinar or review the UC retirement handbook)

UC retirees enjoy a robust pension plan and can choose from a variety of retiree health care plans. This session will help you to understand your retirement benefits and the steps you will need to take in order to retire from UC. A representative from the UC Retirement Administration Service Center (RASC) will review a variety of topics, including income options, survivor benefits, examples of retirement benefits calculations and an overview of retiree health care options and costs.

*Speaker: Donald Goldberg is a senior benefits analyst at the Retirement Administration Service Center (RASC) at the UC Office of the President in Oakland. He has been with UC since 2006 and has retired more than 2,000 UC retirees. Before coming to RASC, he worked as an analyst in the UC Davis Medical Center Benefits Department. Prior to coming to UC, he worked in insurance and financial planning for close to 20 years.*

**#2: Preparing Financially for Retirement** (Friday, January 19, 9 a.m. – noon or 1:30 – 4:30 p.m.)
(Those who are unable to attend can visit [http://myucretirement.com](http://myucretirement.com) or call Fidelity at 866-682-7787)

You may be planning and saving for retirement, but how do you know that you will not outlive your assets? In this two-part workshop, you will learn more about preparing financially. In the first half of the workshop, you will learn about the greatest financial risks faced by retirees and will be introduced to an online income planning tool that will project income and expenses throughout your retirement. In the second half of the workshop, you will learn more about the role Social Security benefits play as part of a retirement income strategy, including eligibility, benefits calculations, and spousal benefits.

*Speaker: Andrew Fung, a Fidelity director, retirement planner, has more than five years with the company. He was previously a financial consultant at Fidelity’s Pasadena, California, Investor Center. A Chartered Retirement Planning CounselorSM, investment advisor representative, and registered securities*
representative, Andrew holds a bachelor's degree in business administration from the University of California, Riverside.

#3: Work/Life Transitions (Friday, January 26, 9 a.m. – noon or 1:30 – 4:30 p.m.)
(Those who are unable to attend can download the “Steps to Retirement from UCLA” brochure)

While you may have put a lot of effort into preparing financially for retirement, how much thought have you given to preparing for the non-financial aspects of this new life phase? Not only are you leaving something, you are about to begin something new. Retirement is a major life transition that can bring unexpected changes to self-perception, relationships with family/friends and many other aspects of your life. During this interactive session, you will learn about strategies to make this next life chapter your best life chapter and you will hear from a panel of retirees who will share their personal retirement transition experiences.

Speaker: Sue Barnes, director of the UCLA Emeriti/Retirees Relations Center (ERRC), has 23 years of UC experience in a variety of management positions. She has worked with retirees for more than 10 years, first as recreation director at a continuing care retirement community, then as director of the UC Davis Retiree Center and now as director of the ERRC. She has a passion for serving older adults and is constantly inspired by the spirit and positivity among UCLA retirees.