Path Forward to Retirement for Staff 2020

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. All three sessions will be held on the UCLA campus at the James West Alumni Center, Collins Room.

1. **UC Retirement Plan and Retiree Health Benefits** (Wednesday, January 15, 8:30 – 11:30 a.m. or 12:30 – 3:30 p.m.)
2. **Preparing Financially for Retirement** (Wednesday, January 22, 8:30 – 11:30 a.m. or 12:30 – 3:30 p.m.)
3. **Work/Life Transitions** (Wednesday, January 29, 8:30 – 11:30 a.m. or 12:30 – 3:30 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@chr.ucla.edu. For questions about the curriculum or other general questions, contact Ayesha Dixon, Director of the UCLA Emeriti/Retirees Relations Center, at adixon@errc.ucla.edu

#1: **UC Retirement Plan and Retiree Health Benefits** (Wednesday, January 15, 8:30 – 11:30 a.m. or 12:30 – 3:30 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.

Speakers:

Donald Goldberg is a customer care supervisor at the UC 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.

Angela Clark is one of the newest benefit analysts with the RASC. She joined the UC in 2017, but has more than 18 years of retirement planning and consulting experience. Angela's background reaches into all retirement related areas, such as 401(k), 403b and 457 plans as well as defined benefit and defined contributions plans. She holds a life, health and property & casualty insurance license and a securities license. She loves traveling, making memories with her family and is passionate about retirement.

#2: **Preparing Financially for Retirement** (Wednesday, January 22, 8:30 – 11:30 a.m. or 12:30 – 3:30 p.m.)

(Those who are unable to attend can visit 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 been with Fidelity since 2011, first at the Pasadena, California, Investor Center and then at UCLA. A Chartered Retirement Planning Counselor^SM, 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 (Wednesday, January 29, 8:30 – 11:30 a.m. or 12:30 – 3:30 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: *Ayesha Dixon, Director of the UCLA Emeriti/Retirees Relations Center (ERRC), came to UCLA in 2019. For over ten years, she has been involved in both the private and public sector dedicated to the advocacy, civic engagement and program development in the field of aging*