



## 2026 Retirement & Financial Wellness Workshops

Date	Begin Time	End Time	Subject	Presenter	Room/Web Link
3/23/2026	8:30 AM	9:30 AM	<b>Get a head start on your future</b> <i>We'll walk through the importance of saving and the benefits and opportunities available to you in your plan.</i>	TIAA	UC East 2219-2220
3/23/2026	10:00 AM	10:45 AM	<b>Investing Essentials: Five principles to invest with Confidence</b> <i>Get a head start on smart, secure investing with simple principles.</i>	TIAA	UC East 2219-2220
3/23/2026	11:00 AM	11:45 AM	<b>Navigating the sandwich generation: Financial strategies for the caregiving squeeze</b> <i>Learn how to manage caring for your aging parents while supporting your adult children. It can be done.</i>	TIAA	UC East 2219-2220
3/23/2026	12:00 PM	12:45 PM	<b>Steps to help secure your income in retirement: a mid-career check-in</b> <i>Take stock of where you are at this critical checkpoint and use retirement-saving strategies to better balance competing financial priorities.</i>	TIAA	UC East 2219-2220
3/23/2026	1:30 PM	2:15 PM	<b>Built smart financial habits for success</b> <i>Kick-start our financial journey--learn to set goals, budget, manage emergencies, and build lasting money habits for lifelong financial health.</i>	TIAA	UC East 2219-2220
3/23/2026	2:30 PM	3:15 PM	<b>How can I afford college for my kids or grandkids</b> <i>Discover strategies you can use to save and pay for college--even if it feels impossible today.</i>	TIAA	UC East 2219-2220



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Date	Begin Time	End Time	Subject	Presenter	Room/Web Link
3/26/2026	9:00 AM	10:00 AM	<p><b>Understanding Social Security</b></p> <p><i>This virtual session on Understanding Social Security is tailored for USI employees and their loved ones who plan to retire within the next 5-10 years, as well as individuals seeking insights into Social Security. Participants gain knowledge on the application process for Social Security Income, exploring the impact of age and wages on benefit amounts. The workshop covers key aspects such as the intersection of work and benefits, and it provides insights into survivor and disability benefits. Whether contemplating retirement or simply aiming to enhance their understanding of Social Security, attendees receive valuable information to make informed decisions about their future financial well-being.</i></p>	<p>Charo Boyd</p> 	UC East 2219-2220
3/26/2026	11:00 AM	12:00 PM	<p><b>The USI Retirement Offering</b></p> <p><i>This session is designed for eligible USI employees seeking insights into their retirement benefits, including medical, dental and life coverage. Participants will gain knowledge about USI's retirement policy offerings, eligibility criteria and the transition process from an active employee to retiree status. The workshop aims to provide a comprehensive understanding of the available retirement benefits, empowering employees to navigate the transition effectively and make informed decisions about their retirement plans within USI .</i></p>	<p>Amy Miller</p> 	UC East 2219-2220
3/26/2026	11:00 AM	12:00 PM	<p><b>Understanding Required Minimum Distributions (RMDs)</b></p> <p><i>This webinar is designed to explain when you make pretax contributions to your retirement account, taxes aren't due until you withdraw your money in retirement. But what if you don't withdraw the money? Well, the IRS makes sure you do—through required minimum distributions when you turn 73. In this webinar you'll get insights on:</i></p> <ul style="list-style-type: none"> <li>• What RMDs are and when they apply</li> <li>• Exceptions to the basic RMD rules</li> <li>• How to take your RMDs</li> <li>• How to avoid costly mistakes</li> <li>• What you can do with your money</li> </ul>	<p>Monthly Webinar</p> 	<p><a href="#">Understanding Required Minimum Distributions (RMDs)</a></p>



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3/26/2026	12:00 PM	1:00 PM	<p><b>Understanding Social Security</b></p> <p><i>This virtual session on Understanding Social Security is tailored for USI employees and their loved ones who plan to retire within the next 5-10 years, as well as individuals seeking insights into Social Security. Participants gain knowledge on the application process for Social Security Income, exploring the impact of age and wages on benefit amounts. The workshop covers key aspects such as the intersection of work and benefits, and it provides insights into survivor and disability benefits. Whether contemplating retirement or simply aiming to enhance their understanding of Social Security, attendees receive valuable information to make informed decisions about their future financial well-being.</i></p>	<p>Charo Boyd</p> 	UC East 2219-2220
3/26/2026	1:00 PM	2:00 PM	<p><b>How to keep your identity and money safe</b></p> <p><i>This session will cover identity theft risks, prevention techniques, and steps to take if personal information is compromised. With practical advice and actionable insights, this workshop equips employees with the knowledge to build a secure financial future.</i></p>	<p>Alvaro Navarette</p>  <p>FIFTH THIRD BANK</p>	UC East 2219-2220
3/26/2026	2:00 PM	3:00 PM	<p><b>Building Financial Security – Investing and Credit</b></p> <p><i>Achieving financial stability requires smart investment, strong credit management, and proactive identity protection. This workshop will guide employees through key financial topics, including maximizing workplace investment opportunities like employer-sponsored retirement plans and exploring investment strategies beyond work, such as brokerage accounts and real estate.</i></p>	<p>Tricia Easley</p>  <p>FIFTH THIRD BANK</p>	UC East 2219-2220
3/26/2026	3:00 PM	4:00 PM	<p><b>The USI Retirement Offering</b></p> <p><i>This session is designed for eligible USI employees seeking insights into their retirement benefits, including medical, dental and life coverage. Participants will gain knowledge about USI's retirement policy offerings, eligibility criteria and the transition process from an active employee to retiree status. The workshop aims to provide a comprehensive understanding of the available retirement benefits, empowering employees to navigate the transition effectively and make informed decisions about their retirement plans within USI.</i></p>	<p>Amy Miller</p> 	UC East 2219-2220