

Fall into Financial Wellness:
HR Annual Retirement Seminar for UH Faculty and Staff

M.D. Anderson Library, Elizabeth D. Rockwell Pavilion

- **Wednesday, October 9, 2024; 12:00 PM – 3:30 PM**
- **Thursday, October 10, 2024; 9:00 AM – 1:45 PM**
- **Friday, November 8, 2024; 9:00 AM – 10:00 AM**

SESSION SCHEDULE AND DESCRIPTIONS:

WEDNESDAY, OCT. 9, 2024

12:00 PM – 1:30 PM, TRS – Ready to Retire

This workshop is for employees working in higher education who would like to learn about retirement. Covered topics will include how the TRS retirement plan works, what qualifies you to retire, and how the plan will benefit you in retirement.

1:30 PM – 2:30 PM, ERS - Ready, Set, Retire

In this informative workshop, representatives from ERS will discuss your medical benefits options in retirement. Included in this session will be important information related to dependent coverage and post-retirement life insurance.

2:30 PM – 3:30 PM, ERS - Medicare Preparation

Whether you're an employee or retiree, attend a Medicare Preparation session and learn about Medicare and how it works with your ERS benefits. ERS gets many questions from members who near Medicare eligibility, and we want to answer your questions early to assist you with the Medicare process.

THURSDAY, OCT. 10, 2024

9:00 AM – 9:45 AM, TIAA

Most people wonder whether they're saving enough for retirement. Well, that depends on a few things, not least of which is what you want your retirement to be. In this session, TIAA representatives will help you get an idea of how much you may need, and how to create and implement a plan to help pursue your goals to meet those needs—and wants!

10:00 AM – 10:45 AM, Fidelity

Financial decisions can be difficult. Let Fidelity help with an approach that makes good sense, and starts with a retirement plan. Fidelity representatives can help you create yours by showing you how to un-complicate your financial picture and make meeting your saving goals easy. Attend this session to become more confident about your investing and future planning decisions.

11:00 AM – 11:45 AM, Voya

The ups and downs of the market can be stressful – but don't panic. This is not as unusual as you may think. In this presentation, Voya representatives will help you understand why you should consider staying put and how to deal with the stress that can be associated with dealing with the market. Also, learn what you can do to stay focused during this time as well as where to go from here.

12:00 PM – 12:45 PM, Corebridge Financial

Are you on the right track for the retirement you envision? Get ready to learn how you can create and set a plan in motion to prepare for the future. Become a savvy saver. Learn the steps you can take now and over time to acquire the reserves necessary to meet your retirement goals.

1:00 PM – 1:45 PM, Texa\$aver 457(b)

To have a comfortable retirement income, you cannot rely on a pension plan and Social Security alone. Instead, you will need to plan, invest and make good use of tax-advantaged savings like the Texa\$aver program. With the Texa\$aver voluntary retirement savings program, you can increase your personal retirement savings to bridge the financial gap as well as weather inflation and things like increased medical expenses as you age.

COMING IN NOVEMBER

FRIDAY, NOVEMBER 8, 2024

9:00 AM – 10:00 AM, Social Security and Medicare Basics

For most Americans, Social Security is essential for retirement. Join the Social Security Office for a special presentation to learn more about Social Security and how it can benefit you when you retire. Also learn about Medicare so that you'll be prepared when the time comes to enroll.

PLEASE JOIN US. ADD THESE SESSIONS TO YOUR CALENDAR AND PLAN NOW TO ATTEND!