The Financial Wellness Series is a month-long event, held in April, where the UCF HR Benefits section hosts a series of workshops, presentations, and webinars designed to provide UCF employees with practical tools and resources to build their financial knowledge and future.

Throughout the series, various vendors, companies, financial planners, and even UCF professors will provide extremely helpful information and material on how you can save money in different ways and plan for more a financially secure future.

How to Register

Online at https://my.ucf.edu > Self Service > Learning & Development > Request Training Enrollment > Choose one of 4 search methods to complete enrollment. Check the following Financial Wellness Series Brochure for the course code and session number. Once enrolled you will receive a confirmation email containing the links to view the webinars on their specified date and time.

CAPTRUST individual meetings have a separate registration link found on the Financial Wellness Series Brochure and does not require enrollment through myUCF.

On Demand Webinars

There are several pre-recorded webinars from the Florida Retirement System, the Bureau of Deferred Compensation and UCF retirement vendors available to watch online. You can access these webinars throughout the month of April.

More Information

See our website for information on this year’s presentation dates, topics, and other financial savings resources: https://hr.ucf.edu/financial-wellness-series/.

Contact Us

If you have any questions on the Financial Wellness Series, contact Benefits@ucf.edu or call 407-823-2771.
### Financial Wellness Series Brochure

**2022 Agenda**

**Tuesday, April 5 @1pm or 3pm: Social Security & Your Retirement**  
*Course RET56; Session 0001 or 0002*  
Do you know the role Social Security will play in your retirement? Learn how to qualify for a benefit, how to obtain and understand benefit estimates and the rules for taxation of benefits. Get guidance on deciding when to start collecting it. Presented by the Florida Retirement System.

**Wednesday, April 6 @2pm: UCF Employee Tuition Waiver**  
*Course RET57; Session 0001*  
Did you know you may get six free UCF credit hours per semester? Or that you could transfer this benefit to your eligible dependents looking to take UCF courses. Learn about the eligibility requirements, available courses and programs, applications, deadlines and the approval process. Presented by UCF Student Accounts & HR Benefits.

**Thursday, April 7 @2pm: Deferred Compensation**  
*Course UCF457; Session 0002*  
This course will explain your options to save additional money for retirement through voluntary contributions to a deferred compensation 457 account. Learn about the advantages of a 457 account and how it compares to other retirement saving plan options such as a voluntary 403b. Presented by the Bureau of Deferred Compensation.

**Friday, April 8 @1pm: Retiring from UCF - FRS Pension Members**  
*Course RET04; Session 0014*  
Thinking or planning for retirement from the FRS Pension? This session explains the timing, application, estimates, and added benefits under the FRS Pension plan. Also learn about insurance continuation options as a retiree, and the UCF leave payout process. Presented by HR Benefits.

**Friday, April 8 @3pm: Retiring from UCF - FRS Investment & State University System Optional Retirement Program (SUSORP) Plan Members**  
*Course RET48; Session 0002*  
Thinking of retiring from the FRS Investment or SUSORP? This session is a guide to understanding retirement, insurance continuation as a retiree and the UCF leave payout process. Presented by HR Benefits.

**Monday, April 11 @2pm: 25 Documents Every Person Should Have**  
*Course RET55; Session 0001*  
Addresses budgeting and debt management, discuss credit, look at insurance and other savings vehicles and finally talk about retirement planning and college savings.

**CAPTRUST Individual Meetings (By appointment only)**  
A CAPTRUST Financial Advisor will be conducting individual virtual one-on-one sessions with employees on April 12th. Spaces are limited, only 12 thirty minutes slots are available.

**CAPTRUST**

Access valuable financial wellness information from CAPTRUST, the independent advisor for the UCF voluntary 403(b) plan. CAPTRUST’s retirement counselors are available to provide you with individual, unbiased investment advice, and assist you with your retirement plan investment decisions.

**Wednesday, April 13 @2pm: A Woman's Guide to Financially Ever After**  
*Course RET52; Session 0002*  
This session provides strategies for getting finances on track, understanding retirement plans such as 403(b) accounts, and reaching your idle retirement in 10 to 15 years. Presented by TIAA.

**Tuesday, April 19 @2pm: Investing Basics**  
*Course RET03; Session 0007*  
Paul Gregg will share some of the same information he teaches students about retirement and investing strategies in his Personal Finance class. Presented by Paul Gregg, Assistant Chair, Finance Executive in Residence.

**Wednesday, April 20 @2pm: Your Life in Retirement**  
*Course RET51; Session 0002*  
This workshop focuses on those who are on the verge of retiring or already enjoying retirement. Employees might have some questions on what to do with the money they have accumulated on how to maximize their income resources to help ensure a more fulfilling and enjoyable retirement journey. Presented by AIG.

**Thursday, April 21 @2pm: Prioritize Before Retirement**  
*Course RET52; Session 0001*  
This workshop is specially designed for those who are approaching retirement. This age group may be thinking more and more about how prepared they need to be to comfortably retire. They will learn about five principles that may be important to prioritize as retirement approaches. Presented by AIG.

**Friday, April 22 @1pm: Retirement@Work**  
*Course RET55; Session 0002*  
This session will provide a demonstration on how to use the new Retirement@Work platform to enroll, view account details, and make changes to your pre-tax or aftertax 403(b) plan with all of the UCF 403(b) providers. Presented by HR Benefits.

**Friday, April 22 @3pm: FICA Replacement Plan**  
*Course RET59; Session 0001*  
Learn about the mandatory retirement plan for OPS, Adjunct, Post Doc, and Medical Resident employees. Understand the enrollment process, contributions, investments, and distributions. Presented by HR Benefits.

**Tuesday, April 26 @2pm: Investing in Uncertain Markets**  
*Course RET49; Session 0002*  
The pandemic has caused uncertainty in the market and expected savings. This session will help you understand how to better invest your money, lower your risk of loss, and reach your financial goals. Presented by TIAA.

**Wednesday, April 27 @2pm: Managing My Money**  
*Course RET63; Session 0001*  
This workshop will provide manageable strategies, tools, and tips that can help you take control of your spending, saving, and debt. Presented by Fidelity.

**Thursday, April 28 @2pm: Preserving our Savings for Future Generations**  
*Course RET64; Session 0001*  
Get a general understanding of what assets are potentially taxable and how they might be distributed. Learn the importance of a living will and health care proxy, as well as the basics of trusts, gifting, and possible insurance replacement strategies. Presented by Fidelity.