Financial Wellness Series

April 2024

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

To register for courses and get more course information, follow the instructions below:

1. Go to **workday.ucf.edu** and sign in with your NID credentials
2. In the search bar at the top of the Workday screen, type "**Browse Learning Content**" and select "Browse Learning Content" from the search results.
3. Search for the course by entering the course name in the catalog search bar; you can narrow the search by entering "**Financial Wellness Series**" in the catalog search bar.
4. Select the desired course, select the offering and click "**OK**."
5. On the Review screen, click "**Submit**" and "**Done**."
6. On the next screen, click "**Add to Calendar**."

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

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 Financial Wellness Series website for information on this year's presentation dates, topics, and other financial savings resources.

If you have any questions on the Financial Wellness Series, contact the UCF HR Benefits team via email Benefits@ucf.edu or call 407-823-2771.

FINANCIAL WELLNESS SERIES

UCF

2024 BROCHURE

Tues., April 2, 2 p.m. | Social Security Admin - 101
Want to learn about Social Security? Join us for an overview of Social Security Administrations Programs & Services! Presented by SSA.

Wed., April 3, 2 p.m. | Retirement Investing with the State of Florida Deferred Compensation 457b Plan
This course will explain your options to invest additional money for retirement through voluntary contributions to a deferred compensation 457b account. Presented by the Bureau of Deferred Compensation.

Thurs., April 4, 2 p.m. | Your Future Starts Now
Learn how to save for the future while still meeting other goals. Learn how to make saving possible and prioritize it along with tax advantages. Presented by Corebridge Financial.

Fri., April 5, 2 p.m. | Retiring from UCF - Retiring from the Pension & What to Know About DROP
Thinking or planning for retirement from the FRS Pension? This session explains the benefits of the FRS Pension, DROP, Leave Payouts and the insurance continuation options Presented by HR Benefits Team.

Tues., April 9, 2 p.m. | Take Control of Your Future
Discusses the important reasons to enroll in a workplace retirement plan, such as advantage of saving early, sources of retirement income, and custom plan eligibility. Presented by Corebridge Financial.

Thurs., April 11, 2 p.m. | Investing Basics
Paul Gregg, Assistant Chair, Finance Executive in Residence, will share some of the same information he teaches students about retirement and investing strategies in his Personal Finance class.

Get valuable financial wellness insights from CAPTRUST, the UCF voluntary 403(b) plan's independent advisor. CAPTRUST's retirement counselors offer personalized, impartial investment advice and aid in your retirement plan decisions.

Wed., April 10, 2 p.m. | Do Yourself a Favor & Become a Better Saver
This presentation emphasizes the significance of saving for retirement, offering insights into Florida's retirement plans, focusing on the voluntary 403b plan for supplementing savings.

Individual Meetings (By appointment only)
Thurs., April 11 | Register at bit.ly/CAPTRUSTFWS24
A CAPTRUST Financial Advisor will be conducting individual virtual one-on-one sessions on April 11, 2024. Space is limited, only 10, 45-minute slots are available.

CAPTRUST **800-967-9948** www.captrustadvice.com

Tues., April 16, 2 p.m. | Attention to Detail: Financial Finishing Touches for Women (Presented by TIAA)
This session provides strategies for getting finances on track, understanding 403 (b) retirement plans accounts, & reaching your ideal retirement in 10 to 15 years.

Wed., April 17, 2 p.m. | Fundamentals of Retirement Income Planning
This workshop will help you learn the benefits of a retirement income plan, identify retirement income sources and expenses, and explore different retirement income strategies. Presented by Fidelity.

Thurs., April 18, 10 a.m. | Nearing Retirement in the FRS
This 90-minute workshop focuses on discussing practical issues important for those nearing retirement. Topics include setting retirement goals, including income needs, and understanding your sources of retirement income, including FRS plans and Social Security.

Fri., April 18, 2 p.m. | Protecting Yourself and Your Loved Ones
This 90-minute estate and insurance planning workshop is designed to assist you in understanding the importance of protecting yourself and your entire family. The workshop will answer questions on how FRS and Social Security benefits affect your survivors, why you should have a will, living will, power of attorney, and other essential estate documents. Presented by FRS.

Fri., April 19, 2 p.m. | Retiring from UCF ORP/Investment Plans
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.

Tues., April 23, 2 p.m. | Managing My Money
This workshop will help you identify the three core components of a sound budget, begin to build (or rebuild) your emergency savings fund, and get control over prioritizing your debt. Presented by Fidelity.

Wed., April 24, 2 p.m. | Write your Next Chapter: 5 Steps to Setting Your Retirement Date
This seminar focuses on deciding when the time is right to retire, including estimating retirement expenses, closing any income gap and understanding key milestone that can impact retirement finances. Presented by TIAA.

Thurs., April 25, 2 p.m. | Life Insurance: Why it Matters Now More Than Ever
Life insurance may be one of the most important purchases you make financially for your loved ones.If you passed away would your family have the money to pay for your final expenses and maintain their current standard of living? Presented by Gabor.

Tues., April 30, 2 p.m. | Understanding your FSA, HSA & HRA
This workshop will provide manageable strategies, tools, and tips that can help you take control of your spending, saving, and debt. Presented by Chard Snyder.

Scan the QR code to
Learn more about the Financial Wellness Series