IN PERSON SESSIONS
Online at https://my.ucf.edu > Employee Self Service > Learning & Development > Request Training Enrollment > Choose one of 4 search methods to complete enrollment. Check course descriptions for code and session number.

LIVE CAST SESSIONS
No need to register. View at http://ucf.adobeconnect.com/financial_wellness_series

LOCATION
With the exception of the CAPTRUST webinars, all sessions are 3:00 to 4:30 pm at UCF Human Resources office in Research Park:
3280 Progress Drive, Suite 100
Orlando, FL 32826

CF Shuttle Bus Route 9
Overflow parking at University Tower's lot

CONTACT US
benefits@ucf.edu
https://hr.ucf.edu
407.823.2771

FINANCIAL WELLNESS SERIES

OTHER WAYS TO SAVE $

Abenity
UCF employees receive discounts from an elite collection of local and national hotels, car rentals, florists, theme parks, national attractions, movie theaters, restaurants, retailers, concerts & more through Abenity. Discounts are online, over the phone, in-store or through printable and mobile coupons. Visit https://ucf.abenity.com for more information.

HealthAdvocate
The UCF employee assistance program (EAP) provided by Health Advocate has various services available to employees including financial resources. Through our EAP employees have access to estate planning and paying for college webinars; car loan, mortgage, and debt relief calculators; budgeting, wills, and tax forms; and telephone consultations with financial and legal specialist. This benefit is not available to OPS employees. For more information call 877-240-6868 or visit https://hr.ucf.edu/employeediscountassistance.

SGA Ticket Center
All UCF students, faculty, and staff employees with a valid UCF ID card have access to discounted tickets for theme parks, movie tickets, dinner/theater shows & more at the SGA Ticket Center located in the Student Union on Main Campus. Quantities are limited. For more information visit https://ticketcenter.sdes.ucf.edu/current-prices.

Southwest
UCF has partnered with Southwest Airlines to offer travelers negotiated rates and bonus points on Southwest fares. This benefit can be used for personal and business travels when booked through Concur. For more information contact the Travel Team at Travelfa@ucf.edu.

Technology Product Center
TPC offers academic discounts on hardware and software. As an Apple Authorized Retailer, the TPC offers student, faculty, and staff discounts on Apple Hardware ranging between $50 - $200. The TPC also offers faculty and staff Microsoft Office for $15 as well as education discounts on Dell and Microsoft products. Call 407-823-5603 or contact TPC@ucf.edu for more information.
Financial Wellness Series

APRIL 2019

All Sessions & Webinars will be held from 3:00 - 4:30 pm

Monday, April 1: Budgeting Workshop
Course RET12; Session 0004
Learn how to create and maintain a realistic budget using tracking data and a worksheet while discussing ideas to reduce expenses. Presented by Debt Management Credit Counseling.

Tuesday, April 2: First Time Home Buyers Education
Course RET33; Session 0001
Introduces individuals to the home buying process from purchase to taking ownership to home maintenance. Presented by Debt Management Credit Counseling.

Wednesday, April 3: UCF Long Term Disability Benefit
Course RET36; Session 0001
This voluntary benefit allows UCF employees to protect a significant portion of their income in the event he or she is unable to work due to a covered illness or injury. It is available without taking a medical exam during Gabor's Open Enrollment period through April 19. Presented by The Gabor Agency.

Thursday, April 4: Millennials
Course RET37; Session 0001
Millennial employees born between 1981-1996 benefit from this session outlining the unique financial challenges faced by their generation and the resources available to help plan for the future. Presented by VALIC.

Friday, April 5: Conquering Student Loan Debt
Course RET34; Session 0002
In this session learn strategies using a repayment plan that makes the most sense for you. If you are one of the tens of millions of Americans who could qualify for student loan forgiveness program, this session is for you. Presented by VALIC.

Monday, April 8: Social Security & Medicare
Course RET05; Session 0005
Are you planning for retirement? Do you have questions about Social Security or Medicare? Ask a Social Security representative in person during this informative session about both topics. Presented by Social Security Administration.

Tuesday, April 9: Maximize Social Security in Retirement
Course RET38; Session 0001
Approaching retirement? Not sure when to start collecting your Social Security benefits? This workshop will explain your options to help determine when and how to claim the benefit. Presented by Fidelity.

Wednesday, April 10: Saving in a Roth
Course RET39; Session 0001
Can't decide between pretax or after-tax savings? This sessions will explain the advantages of saving money as Roth (after-tax) contributions compared to other retirement saving options such as pretax savings at work or IRAs. Presented by Fidelity.

Monday, April 15: Investing Basics
Course RET03; Session 0005
Paul Gregg will share with you 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.

Tuesday, April 16: Inside Money - Managing Income & Debt
Course RET40; Session 0001
Do you talk about a budget, but don't make or stick to one? Have debt, but don't understand its effects? We will show you the real impact of both and help you understand how your money can work for you. Presented by TIAA.

Wednesday, April 17: Money at Work - Foundations of Investing
Course RET32; Session 0002
Smart investing starts with a solid grasp of the basics. The more you know, the better prepared you are to make informed investment decisions. This session will highlight different types of investment options available as you make choices for your financial needs. Presented by TIAA.

Friday, April 19: Retiring from UCF
Course RET04; Session 0012
Thinking about retirement but not sure where to start? Our HR Benefits representatives will discuss the steps each employee should take when retiring from UCF. Presented by UCF HR Benefits.

Monday, April 22: Personal Finance
Learn from experts about credit, budgeting, understanding and managing debt, and retirement planning. 3:00 to 4:30 pm.

Friday, April 26: Investing Mistakes & How To Avoid Them
Learn about the common mistakes and pitfalls regarding investing and some simple methods that can be used to stay on track. 3:00 to 4:30 pm.

CAPTRUST INDIVIDUAL MEETINGS
By Appointment Only
CAPTRUST Financial Advisors will be onsite conducting individual one-on-one sessions with employees on April 24 and 25. Register via https://bit.ly/2MVd3mc:

- Monday, April 29: Nearing Retirement in the Florida Retirement System
Course RET01; Session 0011
In this session, practical issues important for those nearing retirement in the Florida Retirement System will be discussed, including: setting retirement goals, including income, needs, and understanding sources of retirement income, such as Florida Retirement System plans and Social Security. Presented by Florida Retirement System.

- Tuesday, April 30: Investment Planning
Course RET41; Session 0001
This session explores a six-step process for managing your investments. You will learn about the different types of asset classes, how to allocate funds among your investment choices, managing risk, and more. This session is geared towards Florida Retirement System Investment plan members, but has helpful information regardless of which Florida Retirement System plan you may be in. Presented by Florida Retirement System.

Access valuable financial wellness information on the go in these online presentations from CAPTRUST, the independent advisor to the UCF voluntary 403(b) plan, via https://bit.ly/2VMd3mc.

CAPTRUST’s retirement counselors are available to provide you with individual, unbiased investment advice, and assist you with your retirement plan investment decisions. This service is available to you all year at no additional cost as a part of your retirement benefits package. Call 800-967-9948 or visit www.captrustadvice.com for additional information.