UNIVERSITY of WEST FLORIDA | Human Resources

YOUR FINANCIAL FUTURE ROADMAP
A Guide to Planning for Tomorrow

A series of seven two-hour informational programs designed to help you plan for your financial future. Spouses are also invited to attend.

Every Friday Afternoon
September 14 – October 26, 2018

Please go online to the HR Training Reservation Desk (https://nautical.uwf.edu/comm/desk/main.cfm) as early as possible to enroll in classes.

SESSIONS:

• When Employment Income Fades: Social Security & Medicare
• Using the Florida Retirement System to Plan for Your Retirement
  • A Different Kind of Savings Plan: Deferred Compensation
  • Protecting Your Family’s Future: Estate Planning
  • Medicare Made Easy
• Investing 101: 403(b) Tax Deferred Annuities & the Optional Retirement Program (ORP)
• Financing & Planning Your Benefits Transition to Retirement
WHEN EMPLOYMENT INCOME FADES: Social Security & Medicare

Date: September 14, 2018  
Time: 1:30 pm - 3:30 pm  
Location: Bldg. 20W/Rm. 156A  
Speaker: Mr. John Sullivan, Social Security Benefit Solutions

Social Security benefits have often been key in supplementing income when earnings are reduced by retirement, disability, or death. Some of the topics to be discussed include the following: How work credit is earned, who receives benefits, what happens if you return to employment after benefits have commenced, and debunking myths related to the programs. Accessing Social Security and Medicare benefits will also be discussed.
USING THE FLORIDA RETIREMENT SYSTEM TO PLAN FOR YOUR RETIREMENT

Date: September 21, 2018  
Time: 1:30 pm – 3:30pm  
Location: Bldg. 30/Rm. 108  
Speaker: Mr. Dan Grable, MyFRS Financial Guidance Line

This workshop provides an overview of the Florida Retirement System (FRS) and helps you understand the nuts and bolts of planning for your retirement — regardless of where you are in your career. The workshop will demonstrate the importance of planning as early in your career as possible. You will see the role the FRS Retirement Plans play in meeting your financial goals as well as the income gap that must be made up through saving and investing. You will leave the workshop with a full understanding of the ongoing financial planning resources available to you as a member of the FRS and a personal action plan to improve your chances of meeting your retirement goals.
A DIFFERENT KIND OF SAVINGS PLAN:
The 457 Deferred Compensation Program

Date: September 28, 2018
Time: 3:00 pm - 5:00 pm
Location: Bldg. 20W/Rm. 156A
Speaker: Ms. Kim Dillard, State of Florida Bureau of Deferred Compensation

All employees are eligible to contribute a portion of their salaries to a Deferred Compensation 457 plan. The representative will list planning suggestions for those considering retirement. The steps for accessing your investments after separation will be reviewed at this session. There will also be a discussion regarding lump sum payouts for leave into 457 plans.
PROTECTING YOUR FAMILY’S FUTURE:
Estate Planning

Date: October 5, 2018
Time: 1:30 pm - 3:30 pm
Location: Bldg. 20W/Rm. 156A
Speaker: Mr. J. Mark Fisher, Attorney

Thinking about a family member’s passing is never pleasant, but planning ahead can help ease your loved one’s stress later. Would those closest to you know what to do if something were to happen to you? This session will help answer questions like, “Will my spouse or children inherit anything automatically?”, “Is a will the only document I should consider for estate planning?” or, “How do I protect my assets, and who will pay for long term nursing care?” Come learn more about practical steps you can take now regardless of your assets or age.
MEDICARE MADE EASY

Date: October 12, 2018
Time: 1:30 pm – 3:30 pm
Location: Bldg. 20W/Rm. 156A
Speaker: Dr. Joan Connell,
Medicare Planning Specialist

Clear up your confusion about parts A, B C & D of Medicare, enrollment rules, differences between supplements, advantage plans, retiree coverage and more….all in easy to understand plain English. Designed for those approaching Medicare &/or those wanting a review.
The world of investing can sometimes be complicated. Whether you are new to all the vocabulary associated with this financial realm or if you just want a refresher, this session is for you. All employees can benefit from learning about mutual funds and tax sheltered annuities. The presentation will cover basic guidelines on the types of investment funds you may want to consider as well as accessing your investments upon retirement.
FINANCING & PLANNING YOUR BENEFITS TRANSITION TO RETIREMENT

Date: October 26, 2018  
Time: 1:30 pm - 3:30 pm  
Location: Bldg. 20W/Rm. 156A  
Speaker: Mr. Jeff Comeau, UWF Human Resources

This session will discuss the decision to retain insurance after your retirement and the rates. You will also review which insurances may be continued after your retirement. You will receive a Retirement Benefits Checklist and instructions regarding this important transition.
FOR ADDITIONAL INFORMATION ON YOUR SPECIFIC RETIREMENT NEEDS CONTACT:

Jeff Comeau—Associate Director in Human Resources,
at 474.2610 or jcomeau@uwf.edu

— or —

Adrian Rowley—Senior Human Resources Specialist,
at 474.2604 or arowley@uwf.edu

Elsie Rivera—Human Resources Specialist,
at 474.2921 or erivera@uwf.edu

To arrange accommodations for persons with disabilities, call the ADA Office at 850.474.2518 or TTY 850.857.6114

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