University of California Retirement Savings Program
DC Plan
403(b) Plan
457(b) Plan

Focus on Your Future

UC Retirement Readiness Education Program
Schedule of Onsite Events

Please join Fidelity® Retirement Services to learn about investing for retirement and get a better understanding of the steps you can take to help ensure your retirement readiness. Attend the following hands-on workshop(s).

Please join Fidelity Retirement Services for the following workshops and/or helpdesk:

These presentations are sponsored by the University of California. All hands-on workshops run approximately 60 minutes.

All Workshops will be conducted in University Hall 150

Enrolling in your UC Retirement Savings Program

- Learn about the benefits of your Retirement Savings Program
- Determine how much you may need in retirement
- Learn about the Investment Options available in the program
- Learn how to enroll in the plan
- If you are already enrolled, are you on track?

October 2nd, 11:00am
October 13th, 9:00am
November 10th, 9:00am
November 24th, 9:00am
December 8th, 9:00am

Determining your Investment Strategy

- Understand asset allocation and diversification
- Recognize the characteristics of the three asset classes
- Identify your appropriate target asset mix based on your personal situation
- Learn how and when you may need to adjust your mix going forward

October 13th, 10:30am
October 27th, 9:00am
October 28th, 12:30pm
November 4th, 9:00am
November 17th, 8:30am
November 24th, 10:30am
December 8th, 10:30am
December 15th, 8:30am

Achieving a Sound Retirement

- Learn how to create a retirement income plan
- Identify retirement expenses including medical expenses
- Determine sources of retirement income and Retirement Savings Program distribution options
- Recognize the need for wills, trust, powers of attorney, and emergency funds

October 2nd, 12:30pm
October 20th, 8:30am
October 28th, 2:00pm
November 3rd, 3:30pm
November 19th, 9:00am
December 3rd, 9:00am
December 10th, 9:00am

Accessing your Account Online

- Understand Fidelity Retirement Services' online account access system, available virtually 24 hours a day
- See how you can log on any time to access your account and manage your portfolio
- Learn how to use the system to help you get ready for retirement

October 20th, 10:00am
November 19th, 10:30am
December 16th, 1:30pm

Taking Charge of your Financial Fitness

- Understand the importance of saving
- Learn how to evaluate debt
- Outline strategies to take charge of your finances

October 6th, 3:30pm
October 21st, 2:00pm
October 27th, 10:30am
November 10th, 10:30am
December 1st, 3:30pm
December 10th, 10:30am

Quarterly Market Perspective

- Have a better understanding of current market trends
- Review the most recent quarter's market performance
- Discuss economic topics

November 17th, 10:00am
December 15th, 10:00am

The Fundamentals of Retirement Income Planning

- Learn how to put together a written Retirement Income Plan
- Refine your plan for the years ahead
- Assess your financial risks in retirement
- Take advantage of the UC Retirement Savings Program resources

December 16th, 12:00pm

How to Enroll

To reserve a space in the workshop, call 1-800-642-7131, Monday through Friday, 5:00 a.m. to 9:00 p.m. PT.

Online workshops

If you are unable to attend a hands-on workshop in person, the Enrolling in your UC Retirement Savings Program, Determining your Investment Strategy, NetBenefits®, Achieving a Sound Retirement, and The Fundamentals of Retirement Income Planning are available on demand on the NetBenefits website. It's easy to attend these self-paced workshops any time, virtually 24 hours a day, seven days a week. Select **Recorded Workshop** from the News section, and then you can then select from the workshops listed based on your needs.

Keep in mind that investing involves risk. The value of your investment will fluctuate over time and you may gain or lose money.

Before investing in any investment option, please carefully consider the investment objectives, risks, charges and expenses. This and other information on the UC Core Funds is available, free of charge, online at www.netbenefits.com or by calling Fidelity Retirement Services at 1-866-6UC-RSVP (1-866-682-7787). This and other information on the mutual fund options that are part of the UC Core Funds line up and other mutual funds outside the UC Core Fund lineup can be found on each mutual fund's prospectus, which can be obtained, free of charge, at the same web site and toll-free phone number. Read the information carefully before you invest.

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