

# FINANCIAL EDUCATION CALENDAR

## NOVEMBER and DECEMBER 2018

### IN PERSON

#### ONE-ON-ONES:

Am I saving enough? What investments are right for me? Meet with a representative one-on-one and get answers to your retirement savings plan questions.

- Meet with a representative from TIAA and/or Vanguard
- 30-60 minute appointments
- Cambridge and Longwood campuses (various locations)

TIAA = [Register online](#)

Vanguard = [Register online](#)

### ONLINE

Attend a webinar at your work or home computer – or gather in a room with some colleagues.

Below are just a few of the topics offered by our retirement plan vendors during the months of SEPTEMBER and OCTOBER

SERVICE	DATE	TIME	LOCATION	REGISTRATION
<b>TIAA</b> Market-proof your retirement	Nov. 1st	12:00 – 1:00PM	Online	<a href="#">Register online</a>
<b>Special Topic: A view from DC:</b> What the midterm results mean for 2019	Nov. 15th	12:00 – 1:00PM	Online	<a href="#">Register online</a>
Money at Work 1: Foundations of investing 12/5, 3-4 p.m.	Dec. 5th	3:00 - 4:00PM	Online	<a href="#">Register online</a>
<b>Vanguard</b> Vanguard's Principles for Investing Success	Nov. 28th Nov. 29th	12:00 PM & 6:00 PM 3:00 PM	Online	<a href="#">Register online</a> <b>Starting Nov. 5th</b>
Financial freedom: Strategies for Reducing Debt and Saving More	Nov. 28th Nov. 29th	3:00 PM 12:00 PM & 6:00 PM	Online	<a href="#">Register online</a> <b>Starting Nov. 5th</b>
<b>Fidelity</b> For those with a Fidelity account – you can log on to <a href="#">Netbenefits</a> for a complete schedule of their Live Web Workshop. Topics range from “ditching debt” to “when to claim Social Security,” in addition to accessing planning tools and educational resources.				

### ON CAMPUS WORKSHOPS

#### **THE NEXT CHAPTER: Transitioning to Retirement**

*..presented by the Benefits Office, a 2-hour workshop on a successful transition to retirement.*

**Thursday, December 6<sup>th</sup> 2:00-4:00PM**

**114 Mt. Auburn Street – Room 406 – Cambridge, MA**

Registration now available on the Training Portal –click [HERE](#) to be connected.

#### **Preparing for Retirement – December 13, 2018 - 9:00 to 11:15AM**

This program addresses these tangible aspects of retirement planning:

- understanding Social Security and Medicare and how these coordinate with Harvard's post-retirement benefits
- income planning and paying yourself in retirement.

Registration now available on the Training Portal –click [HERE](#) to be connected.



**HARVARD**  
Human Resources