

FINANCIAL EDUCATION CALENDAR

MARCH and APRIL 2024

ONE on ONE phone appointments

ONE-ON-ONES:

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

- Speak with a representative from TIAA
- 30-60-minute appointments

TIAA = [Register online](#)

ONLINE

Attend a webinar at your work or home computer. Below is a sampling of topics offered by our retirement plan vendor, **TIAA**, during the months of **MARCH and APRIL**. Visit <https://www.tiaa.org/webinars2024> for a complete listing of live and on-demand webinars.

| SERVICE | DATE | TIME | LOCATION | REGISTRATION |
|--|------------|----------------|----------|---|
| The Starting Line: Beginning to save for retirement | March 6th | 12:00 – 1:00PM | Online | Register at TIAA.org/webinars |
| Paycheck for Life: Set your sights on retirement security | March 20th | 12:00 - 1:00PM | Online | Register at TIAA.org/webinars |
| Quarterly economic and market update | April 10th | 12:00 – 1:00PM | Online | Register at TIAA.org/webinars |
| Fine-tuning your retirement strategy: Investing toward a secure future | April 16th | 2:00 - 3:00PM | Online | Register at TIAA.org/webinars |

Back by Popular Demand.... MetLife's Tax Strategies – March 14th 1:00-2:00PM

The Basics and Beyond workshop where you will learn about tax planning steps, including tax basics, diversification, cutting your tax bill and when to call a professional. Spouses and Partners are welcomed. **Registration** [here](#).

Lunch and Learn with Harvard Benefits – March 20th

How do you meet the eligibility for Post-Retirement Health Benefits (*also known as the "rule of 75"*)? Join this **Virtual Workshop** on March 20th from 12:00 to 1:00PM. Click on [THIS LINK](#) and use your **HARVARDKEY** to register.

COMING in April...AMERICA SAVES WEEK: <https://americasaves.org/> PLUS...

A series of workshops that complement each other!

First and offered by our friends at the Center for Workplace Development:

Reimagining Retirement: Planning for Your Third Act – A two-session workshop.

April 3rd and April 10th. Click on [THIS LINK](#) and use your **HARVARDKEY** to register

Next and offered by MetLife:

RetireWise Series Workshops – 2 half-days.

April 5 and April 12, 2024: 9:30 AM – 1:00 PM. Registration [here](#).



HARVARD
Human Resources