

FINANCIAL EDUCATION CALENDAR

SEPTEMBER and OCTOBER 2019

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 2019**.

Note: Vanguard will be back with webinar offerings in November

SERVICE	DATE	TIME	LOCATION	REGISTRATION
TIAA SPECIAL TOPIC: Market-proof your retirement	September 12th	3:00 - 4:00PM	Online	Register at TIAA.org/webinars
She's Got It: A woman's guide to saving and investing	September 17th	3:00 – 4:00PM	Online	Register at TIAA.org/webinars
Money at Work 2: Sharpening investment skills	September 18th	12:00 – 1:00PM	Online	Register at TIAA.org/webinars
The Starting Line: Beginning to save for retirement	September 18th	3:00 - 4:00PM	Online	Register at TIAA.org/webinars

Fidelity

For those with a Fidelity account – you can log on to [Netbenefits](#) 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.

DID YOU KNOW??

...If you are enrolled in **Supplemental Life Insurance**, you and your spouse/domestic partner can access [free will preparation and estate resolution/probate services as well as additional services](#)? Call 800-821-6400; use group number 109929.

...Enrolling in the **Tax Deferred Account (TDA- Employee Funded)** can happen any time of year? And that it is easy to enroll for the first time or to make changes? Call 1-800-527-1398 to begin today – or click here for more options: <https://hr.harvard.edu/files/humanresources/files/tdaplan.pdf>.

COMING in October.....How to prepare for Open Enrollment 2020

WHAT is it? Open Enrollment is the time of year that you can make changes to your benefits. The changes that you make during this Open Enrollment will take effect January 1, 2020.

WHEN is it? **October 23rd to November 6th**

WHAT happens next: Check out hr.harvard.edu in mid-September for more information!



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