

2017 UNM Financial Fitness Forum – Make Progress on Your Future Today!

Tuesday, March 21 – North Campus, Domenici West Atrium & Conf Rooms and HSLIC*

	Fidelity Domenici D NE 2410 8:30A- 12N D NE 2410 1-5P	MetLife HSC Medical Bldg II (MT) Med2 E-Classroom 8:30A-4:30P	TIAA Domenici D West B102 9A-12N D West 3110 1:30-3P D West B102 3-4:30P	VALIC Domenici/HSLIC D West B112 8:30-10:30A D West B112 12:30-3P HSLIC 226 3-4:30P	VOYA Domenici D West 3010 9-11A HSLIC 428 11A-12:30P D West 3010 1:30-4:30P
9:00 am-5:00 pm	Stop by to visit with your UNM Financial Services Representatives all day in Domenici West Lobby! “Pick and Choose” workshops are open to employees (except students), sponsored by UNM Benefits.				
9:30 am-10:30 am	Preserve Your Savings For Future Generations Join Webinar Handout	Understand Life and Disability Insurance	Inside Money: Manage Income and Debt	Investing Basics	Retirement Income Planning
11:00 am-12:00 noon	Confident Investing in Any Market	Caring For an Aging Parent? Sandwich Generation Strategies	The Starting Line: Why/How to Save for Retirement	Cash Management	Social Security Planning Join Webinar Handout
1:30 pm-2:30 pm	Tax Saving Strategies Join Webinar Handout	Smart Money Moves in your 20s and 30s	Paying Yourself: Income Options In Retirement	Risk Management	Close The Gaps in Your Financial Plan
3:00 pm-4:00 pm	Retirement Income Planning Join Webinar Workbook Handout1 Handout2	Smart Money Moves in your 40s, 50s, and beyond	Applying for a Mortgage and Debt Consolidation	Retirement Planning	Estate Planning

Wednesday, March 22 – Main Campus, SUB Lower Atrium & 3rd Floor Conference Rooms*

	Fidelity SUB Fiesta A & B	MetLife SUB Isleta	TIAA SUB Luminaria	VALIC SUB Acoma A	VOYA SUB Acoma B
9:00 am-5:00 pm	Stop by to visit with your UNM Financial Services Representatives all day in the SUB Lower Atrium! “Pick and Choose” workshops are open to employees (except students), sponsored by UNM Benefits.				
9:30 am-10:30 am	Take The First Step To Investing	Smart Money Moves in your 20s and 30s	The Starting Line: Why/How to Save for Retirement	Education Savings Plans Join Skype Meeting Handout	Retirement Planning for Women
11:00 am-12:00 noon	Financial Planning For Women	Smart Money Moves in your 40’s, 50’s, and beyond	Halfway There: A Retirement Check-up	Cash Management	Close the Gaps in Your Financial Plan Join Skype Meeting Handout
1:30 pm-2:30 pm	Preserve Your Savings For Future Generations	Understand Life and Disability Insurance Join Skype Meeting Handout	Inside Money – Managing Income and Debt	Retirement Income Planning	Social Security Planning
3:00 pm-4:00 pm	Create A Budget, Ditch Your Debt, and Build For Your Future	Caring For an Aging Parent? Sandwich Generation Strategies	Within Reach: Transitioning from Your Career To Retirement Join Skype Meeting Handout	Risk Management	Improve Financial Wellness with Tax Planning

Confirm with your IT Team the system requirements for Skype Meeting and Webinar access*

2017 UNM Financial Fitness Forum – Session Details

Applying for a Mortgage and Debt Consolidation – Prepare to approach a mortgage lender, calculate your debt-to-income ratio and understand debt consolidation as a potential financial strategy.

Caring For an Aging Parent? Sandwich Generation Strategies – Ideas for covering the costs of long term care, establishing powers of attorney, living wills, and a high level overview of wills, estates, and trusts.

Cash Management: Establish a budget, cut back on spending, and pay yourself first! Start with your action plan.

Close the Gaps in Your Financial Plan – Important tools can help you protect yourself and loved ones from financial catastrophes. Identify where the gaps are in your financial plan. Create action steps to help you make progress.

Confident Investing In Any Market – Sophisticated concepts and tools for evaluating investments to help you get more from your retirement savings. By carefully monitoring your choice of investments, you can help ensure that your savings strategy is set up for success.

Create a Budget, Ditch Your Debt, and Build for Your Future - This workshop will educate you on how to get started with creating a budget and how to manage and prioritize your debt.

Education Savings Plans – Features and benefits of different college savings plans can help provide for your children’s future education expenses.

Estate Planning - What makes up your estate and why it’s important to direct what happens to it during your lifetime and beyond. Probate, estate tax, basics about wills and trusts. Decide what action steps you need to take.

Financial Planning For Women - This workshop is designed for women who understand the basics of investing and would like to learn more about investments and how to make the most of their savings by investing.

Halfway There: A Retirement Check-up – A retirement planning tune-up. Are you on track? Tools and action steps.

Improve Financial Wellness with Tax Planning – Learn strategies to reduce your taxable income and lower your income taxes. Gain a better understanding of your “marginal tax bracket”. Decide which actions to take now and in the future.

Inside Money – Why a budget is important, basics of budgeting, what is cash flow and why it is important. Basics of debt and when to use it. Truth about credit cards and managing debt. Write your personal financial action steps.

Investing Basics - Gain basic and advanced investing concepts to achieve your specific financial goals.

Money at Work – Foundations of Investing: If you’re just starting out or are well into your career, find out which investment vehicles are right for you. Dig into stocks, annuities, mutual funds, IRAs, and which ones fit your needs. Learn about risk and your risk tolerance. Discover different savings principles for short- and long-term goals.

Paying Yourself – Income Options in Retirement: Simplify your plan for retirement income. Learn basic rules that govern most retirement accounts. Decide when to tap into different assets. Discover flexible income choices.

Preserve Your Savings for Future Generations – Pass along more of what you’ve spent time building to the people and causes you care most about.

Retirement Planning - Understand why it’s important to plan ahead to ensure your income in retirement will be enough. Living longer, many sources of income and tax-advantaged savings plans are all important reasons to take charge today. Understand your retirement plan options at work, and the choices available to help you make progress.

Retirement Income Planning – Address financial challenges of living in retirement, including the new realities and how planning can help you address five key retirement risks.

Retirement Planning for Women: Proactive steps to address the unique retirement challenges women face and the factors that can influence success.

Risk Management: Understand the risks of daily living and decide what kinds of protection you need most. Discover ways to use insurance as a key financial tool for yourself, your loved ones, and the legacy you want to leave behind.

Smart Money Moves in Your 20s and 30s: Ten relevant tips from creating a budget, to setting up an emergency fund, to making the most of retirement savings.

Smart Money Moves in Your 40s, 50s and Beyond: Ten key practical financial and retirement planning tips to consider, ranging from managing taxes, to having the right asset allocation, to setting realistic goals.

Social Security Planning - When and how you take Social Security benefits can be one of the most important decisions of your life. It pays to get it right! Learn about the program, how it works, and take steps to ensure a more secure retirement.

Take The First Step To Investing – A review of key investing concepts such as common investment asset types, how different asset mixes align with different goals, benefit of starting investments in a workplace savings plan and how to choose the investment approach that suits you.

Tax Saving Strategies - An expanded, tax-smart strategy session to help you keep more of what you have saved and pay less to the government.

The Starting Line – Why and how to start saving for retirement now. Tackle your debt, start and manage a budget, plan for retirement, tools you can use, and action steps.

Understand Life and Disability Insurance: Learn the benefits of different types of life and disability insurance, which types are best suited for different situations, and how to decide how much insurance you want and need.

Within Reach – Transitioning from career to retirement. Evaluate where you are now. Understand more about retirement income, taxes, health care, insurance, estate planning and risks. Create your action steps.

UNM FINANCIAL SERVICES REPRESENTATIVES

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