

# UNM WELL-BEING EXPO 2019

North Campus

Sept. 18 | 10 a.m. - 2 p.m. | College of Nursing & Pharmacy, 3rd Floor



## EXPO SCHEDULE

WELL-BEING EXPO VENDOR EXHIBITS

10 A.M. TO 2 P.M.

CNP Building Lobby & Plaza

Can't attend in person? All sessions available through Zoom.  
Click the "Attend Virtually!" link below.

### Financial Wellness Sessions- CNP, 3rd Floor

Session Time	Room 364 <a href="#">Attend Virtually!</a>	Room 357 <a href="#">Attend Virtually!</a>	Room 353 <a href="#">Attend Virtually!</a>	Room 359 <a href="#">Attend Virtually!</a>
10 - 11:15 a.m.	Prepare for the Reality of Healthcare in Retirement	Inside Money: Managing Income & Debt	Risk Management: Long Term Care & Life Insurance	Financial Wellness & The Importance of Planning
11:15 a.m. - 12:30 p.m.	Taking the First Step in Investing	The Starting Line: Beginning to Save for Retirement	Retirement Income Realities & Strategies	Tax & Estate Planning for Everyone
12:45 - 2 p.m.	Create A Budget, Ditch Your Debt, & Start Saving for the Future You	Halfway There: A Retirement Checkup	Social Security & Your Retirement	Plan for Your "Someday" - Start Now to Reach Your Dreams

### Physical, Occupational & Emotional Wellness Sessions

Session Time	CNP, Room 368 <a href="#">Attend Virtually!</a>
10 - 10:50 a.m.	Healthy Eating on a Budget
11 - 11:50 a.m.	Movement at Work
Noon - 12:50 p.m.	Off Balance? Find harmony in Work + Life
1 - 2 p.m.	Collaboration: What Key Skill Allows You to Overcome Obstacles and Build Bridges?

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## Financial Wellness Session Descriptions

### Session One: 10 - 11:15 a.m.

#### Prepare for the Reality of Healthcare in Retirement | Room 364

Did you know a 65-year old couple retiring in 2019 can expect to spend \$285,000 in health care and medical expenses throughout retirement? Plan for your retirement healthcare costs with Rose Ronquillo and Aly Kassam of Fidelity by estimating your costs and understanding options before and after age 65.

#### Inside Money: Managing Income & Debt | Room 357

Learn how to help make your money work for you. TIAA Financial Consultants Julie Flores and Kevin Collins will cover the importance of cash flow, tips on saving and spending, and understanding and managing debt.

#### Risk Management: Long Term Care & Life Insurance | Room 353

AIG facilitators Angelo Burns and Karen Schotter will guide you through the different types of insurance to help safeguard against risk. Plan to review your insurance to ensure proper coverage.

#### Financial Wellness & the Importance of Planning | Room 359

There are six pillars foundational to financial wellness. Voya Financial Advisor Cris Giron will present a holistic approach to financial planning to help you be more confident and organized as you save and invest.

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### Session Two: 11:15 a.m. - 12:30 p.m.

#### Take the First Step to Investing | Room 364

Retirement Planners Elaine Chavez and Aly Kassam with Fidelity will help you learn the basics of investing including identifying your ideal investment approach and understanding allocation and diversification.

#### The Starting Line: Beginning to Save for Retirement | Room 357

What is the real affect of time on money? Long-term saving for your retirement is critical to having an adequate nest egg. Learn how budgeting can help you find money to save for your retirement. Facilitators: Julie Flores and Kevin Collins, TIAA Financial Consultants

#### Retirement Income Realities & Strategies\* | Room 353

Facilitators Angelo Burns and Karen Schotter will take you through the realities of retirement and help you address the five retirement risks- longevity, healthcare, inflation, investment and withdrawal.

#### Tax & Estate Planning for Everyone | Room 359

No matter your age or wealth, planning your estate can make a big difference for your loved ones in dealing with this emotionally and financially complex task. Learn simple strategies on how to get started, including establishing key documents, and how to minimize your tax bite. Facilitators: Eddie Fernandez, Voya Financial Planner

# UNM WELL-BEING EXPO 2019

## Financial Wellness Session Descriptions (Cont'd)

### Session Three: 12:45 - 2 p.m.

#### Create a Budget, Ditch Your Debt, Start Saving for the Future You | Room 364

Facilitators Elaine Chavez and Aly Kassam with Fidelity will help you strengthen your financial wellness by learning the steps for maintaining financial health, managing debt, and planning for future goals.

#### Halfway There: A Retirement Checkup\* | Room 357

Monitor your financial wellness with a mid-career financial check-up. TIAA facilitator Julie Flores and Kevin Collins will help you evaluate your current savings, formulate a plan to reach your savings goals, and manage competing priorities such as college savings and short-term savings.

#### Social Security & Your Retirement | Room 353

Explore the cost of retirement and investigate your options to maximize your Social Security benefits. We will provide strategies to bridge possible income gaps in your retirement. Take away valuable retirement planning resources and tips to help create retirement on your terms. AIG facilitators: Angelo Burns and Karen Schotter, Financial Advisors

#### Plan for Your "Someday"- Start Now to Reach Your Dreams | Room 359

If you are 21 to 40 years old, you may feel too young, too busy, or too stretched to save for retirement. Voya facilitators Mario Torres and Antavius Greathouse will teach you the baby steps that can make a huge difference in your "someday." Create a solid plan now with the help of a financial expert.

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## Physical, Occupational & Emotional Wellness Session Descriptions

### Session One: 10 - 10:50 a.m.

#### Healthy Eating on a Budget | Room 368

You don't have to choose between healthy food and a healthy budget- choose both! Learn strategies from Reed Vawter, Registered Dietitian and Health Education Consultant, and Hannah Contrucci, Dietetic Intern, with UNM Employee Wellness, including how to shop, cook, and eat without sacrificing taste and enjoyment.

### Session Two: 11 - 11:50 a.m.

#### Movement at Work | Room 368

Daily physical movement is necessary for optimal health, but can be challenging during our workweek. Lauren Lewis, Health Education Consultant with UNM Employee Wellness, will help you break free from your desk and add more movement into your workday.

### Session Three: Noon - 12:50 p.m.

#### Off Balance? Find Harmony in Work + Life | Room 368

Vanessa Roybal, Health Educator with HSC Wellness, will help you recognize the signs of an unbalanced life and share the benefits of finding a healthier balance. Take away strategies will include improving time organization and managing stress.

### Session Four: 1 - 2 p.m.

#### Collaboration: What Key Skill Allows You to Overcome Obstacles & Build Bridges? | Room 368

Facilitator Anne Lightsey, Associate Ombudsperson with UNM Ombuds Services for Staff, will help you discover and practice an essential skill to help you collaborate more effectively, find common ground, demonstrate respect, and possibly change the world.

*\*Recommended for employee attendees only.*

# UNM WELL-BEING EXPO 2019



## EXPO PRESENTERS

**Angelo Burns**, Senior Financial Advisor  
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**Reed Vawter**, MS, RDN, LD, Health Education  
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