

**Subject:** Instant HR/Payroll: National Save for Retirement Week!

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### **It's National Save for Retirement Week**

This week is National Save for Retirement Week. It's a great opportunity to remind your faculty and staff about resources at Mason that can help them build their financial well-being. We hope you can encourage them to use this week to take action!

- Step #1: Assess Your Savings and Investment Allocation
  - [Schedule an individual retirement counseling session](#) with Fidelity Investments, TIAA-CREF, or ICMA-RC.
  - In addition to the dates listed at the link above, Paula Burrichter of Fidelity Investments is on the Fairfax campus tomorrow, Thursday, October 22. To schedule an appointment with Fidelity on the 22<sup>nd</sup> or any other date they're at Mason, please call 800-642-7131.
  
- Step #2: Build Your Financial Knowledge
  - Visit the Financial Well-Being [portal](#) for on-site classes, online classes, tools, calculators and other resources to help you round out your financial knowledge.
  
  - Upcoming on-site classes are included below. All sessions are videoconferenced to Arlington and Science & Tech. Please visit <http://hr.gmu.edu/learning/hr.php> to register.
    - Thursday, October 29 at noon
      - *Transitioning from Career to Retirement* with Marilyn Huang of TIAA-CREF - Although it's time to make final preparations to ensure a smooth transition from career to retirement, there are many more adventures yet to come. Once you reach retirement, you may have 20 or 30 years to enjoy it. In this workshop you will learn about how you can pay yourself once you're no longer receiving a paycheck, other options to consider - like taxes, healthcare and estate planning, and how to set goals to imagine what your retirement looks like financially and emotionally.
  
    - Monday, November 2 at noon
      - *Preparing Your Savings for Retirement* with Jeff Jones of Fidelity Investments – Jeff will discuss ways to help you boost your savings while you're still at work and steps you can take today as you prepare for your transition into retirement.
  
    - Wednesday, November 11 at **11:30am**
      - *Income and Estate Tax Considerations* with Denise Lambert of TIAA-CREF – Nothing in life is certain, but you can improve your overall financial well-being by creating an estate plan. During this seminar we will help you think through important life planning issues and estate planning strategies. These

include what an estate plan is, the importance of asset ownership and beneficiary designations, the current estate tax environment and what impact the recent tax law changes may have on your overall plan, evaluating trust planning, and determining whether lifetime gifts to your loved ones or charity should play a role in your planning.

- Monday, November 16 at noon
  - *Money at Work: Foundations of Investing* with Marilyn Huang of TIAA-CREF – Marilyn will discuss the role of investing, protecting against various risks, and augmenting traditional savings programs to help accelerate retirement savings, as well as the products and the tools available to manage a growing portfolio.
- Step #3: Have Some Fun!  
Try “[What’s Your Financial IQ, 2.0](#)”, a game from TIAA-CREF that will help you test or build your financial knowledge. The more you play, the more you learn. But wait, there’s more! Each time you play a session, you’re entered into a drawing from TIAA-CREF for a chance to win a gift card. The more you play, the greater your chance of winning. Give it a whirl! Financial IQ is available until October 31.