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Subject: Instant HR/Payroll: New Date for Next Steps Seminar, Faculty Retirement Counseling Resources, Spanish Financial Well-Being Seminar, a Tick Tock Discount at the Movies in Ashburn, April Financial Well-Being, and Book Donations for Prizes

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To: DEPARTMENT-CONTACTS-L@metis3.gmu.edu

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Next Steps: Plan for Your Retirement Rescheduled - Friday, May 8

The Next Steps: Plan for Your Retirement seminar has been rescheduled for Friday, May 8 in the Mason Global Center, Grand Ballroom A. This day-long seminar covers the basics of your benefits in retirement: Social Security, Medicare, Retiree Health Insurance, and retirement plans with the Virginia Retirement System, TIAA-CREF and Fidelity. To register, please visit <http://hr.gmu.edu/learning/register.php?id=2203&type=495>. If you have already registered, Bridget Peabody will be in touch to move your registration to the new date. For questions or concerns, please contact Bridget at 3-6764 or via email at bpeabody@gmu.edu.

Reminder: Faculty Retirement Counseling Resources

HR & Payroll is offering two opportunities for faculty members who would like to further plan for life in retirement:

Faculty Retirement Readiness Coaching

Retirement readiness coaching is for faculty members who would like to further plan for life in retirement. Faculty members take a 20 minute, online Retirement Readiness Assessment, then meet with a certified retirement transitions coach from Mason to review the results and discuss resources and opportunities to prepare for the transition to retirement.

For more information and to register, please contact Kathy Haldeman at khaldem1@gmu.edu.

Planning a Meaningful Life in Retirement Workshop

This interactive workshop for faculty focuses on making a smooth transition to retirement and planning for a meaningful life in retirement. This is not a financial planning program; rather the session focuses on the psycho-social aspects of retirement, where you will live, how you will spend your time, social connections and leisure activities. This session will be held on April 24 from 9:00 am-12:00 noon in Merten 2001.

For more information and to register, please email hrlearn@gmu.edu.

Saving for Life's Milestones with TIAA-CREF (in Spanish)

We are delighted that Conchy Perez, a financial consultant from TIAA-CREF, will be on campus on Monday, March 30 providing financial resources in Spanish. Conchy will be in Research I, Room 162 from 9:00-11:00 and from 1:30-4:30 conducting individual retirement planning sessions. From noon-1:00pm, she will be in Engineering 1605 (videoconferenced to Arlington and Prince William) presenting "Ahorre para mañana empezando hoy" (Savings for Life's Milestones).

To schedule an individual in-person session on March 30, please contact Conchy directly at CGPerez@tiaa-cref.org or by phone at 214-626-8326.

Class Description in English and Spanish:

- Join Conchy Perez of TIAA-CREF to learn how to make the most of your financial future.
 - The importance of maximizing your contributions to a retirement plan.

- Exploring the principles of investing and the importance of managing your objectives.
- Discuss five principles to help you save for your retirement.
- Acompañenos para aprender cómo aprovechar al máximo su futuro financiero.
 - La importancia de maximizar sus aportaciones al plan de retiro
 - Explorar los principios de invertir y la importancia en la gestión de sus objetivos
 - Elaborar cinco principios para ayudarle a ahorrar para su jubilación

A class flyer is available at: <http://hr.gmu.edu/worklife/documents/AhorreparaManana-description.pdf>

Tick Tock Discount: Alamo Draft House Cinema

Our colleagues in OSP tipped us off to this one! Faculty and staff can enjoy a free movie ticket at the Alamo Drafthouse Cinema in Ashburn through March 22nd. For details, please see <http://drafthouse.com/blog/entry/47087>.

April is Financial Literacy Month

In honor of Financial Literacy Month, we have a number of opportunities to share with you.

- In April, Finances are Fun-ances! Stay tuned for a new contest from TIAA-CREF called Square Up Your Savings. Here's another chance to build your own financial knowledge with 10 missions that highlight savings education. There's also a chance to win a prize! Details, as they are available, will be on the financial well-being portal at http://hr.gmu.edu/benefits/retire/online_resources.php
- HR & Payroll will continue our in-person financial well-being seminar series including:
 - April 13: Confident Investing in any Market (Jeff Jones of Fidelity Investments)
 - April 21: Getting Your Financial Records in Order (Kate DeWitt of Personal Money Matters LLC)
 - April 28: Money at Work #1: Foundations of Investing (Lisa Fulco of TIAA-CREF)
 - (followed by Money at Work #2: Sharpening Investment Skills on May 5 with Lisa)

Register for classes at <http://hr.gmu.edu/learning>; click on the course calendar tab

- In our financial well-being portal, there are also a number of on-line opportunities for faculty and staff to engage in financial education at a time convenient to them. We particularly want to call your attention to some resources targeted specifically to women and the LGBT community including:
 - From TIAA-CREF:
 - [Start to Finish: The Early Career Woman's Guide to Financial Wisdom](#) (length 38:16)
 - [She's Got It: A Woman's Guide to Saving and Investing](#) (length 46:28)
 - [Postcards From the Future: A Woman's Guide to Financially Ever After](#) (length 46:56)
 - [Charting Your Course: A Financial Guide for Women](#) (length 25:15)
 - [Attention to Detail: Financial Finishing Touches for Women](#) (length 1:08:57)
 - Equally Prepared: Financial Planning for the LGBT Community (TIAA-CREF)
 - [Part A: Retirement Basics](#) (Length 20:44)
 - [Part B: Estate Planning](#) (Length 32:04)

- [Part C: Tools, Resources, and Taking Action](#) (Length 10:11)

- From Fidelity Investments:

- [Women and Investing](#) (length 18:51)

TIAA-CREF offers a site called [Woman2Woman](#) and an in-person seminar series for women (men are also welcome). The only hurdle is that we need about 35 people to commit to participate. Please ask your faculty and staff to preview a TIAA-CREF online session. If they enjoy them and would be willing to participate in a 4-session in-person series held in Fairfax and videoconferenced to Arlington and Prince William, please ask them to email worklife@gmu.edu and let us know of their interest and whether they would like the sessions scheduled in Summer 2015, Fall 2015, or Spring 2016. Once we have about 35 interested participants, we can reach out to TIAA-CREF and schedule the sessions.

Prize Request: Quality of Work Life Survey

Every three years, the Quality of Work Life Task Force sends out a survey to all faculty and staff about working at Mason. It's slated to go out next month and will be available to complete from April 7 – 30. The survey provides tremendous feedback on work/life at the university.

As in 2012, the Task Force plans to hold a voluntary prize raffle in 2015 with a random drawing of prizes generously donated from around the university. To that end, we welcome donations. New in 2015, we are inviting Mason faculty or staff members who have written books to consider contributing a signed copy to the effort. To make a departmental or book donation, please email worklife@gmu.edu with the details.

Thank you so much for your consideration of this request!

Additional information on the Quality of Work Life Survey is available at <http://qwl.gmu.edu>.

