2015 PRE-RETIREMENT PLANNING PROGRAM

Are you preparing for your retirement? Will you have enough income to live the lifestyle you desire? Do you know what happens when you are eligible for Medicare? Social Security? This series of workshops are targeted to those retiring in the next five years, although everyone is welcome. You are encouraged to attend all workshops; however, space is limited so please enroll at [http://events-manager.ucsc.edu](http://events-manager.ucsc.edu).

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| Tuesday, February 3, 2015   | 2:30 pm to 4:00 pm | Interdisciplinary Sciences Building, Room 102 | **Social Security**  
A minimum enrollment of 25 is required for the Social Security workshop. The workshop is subject to cancellation if minimum registration requirement is not reached by Thursday January 29th. Registered enrollees will be notified if workshop is cancelled.  
This workshop describes how eligibility for Social Security income is established, how benefits are calculated, when Social Security income can begin and the reduction if taken prior to your full retirement age. | Social Security Technical Expert, Social Security Administration |
| Tuesday, February 10, 2015 | 2:30 pm to 4:00 pm | Earth & Marine Sciences Building, Room A340 | **University of California Retirement Plan**  
This workshop provides a detailed examination of the UC Retirement Plan including tools to calculate your retirement income, the retirement process, decisions you should be prepared to make and documents required at retirement. | Donald Goldberg, Benefits Counselor, UC Retirement Administration Service (RASC) |
| Tuesday, February 17, 2015 | 2:30 pm to 4:00 pm | Earth & Marine Sciences Building, Room A340 | **UC Retiree Health Insurance**  
This workshop covers insurance options for retirees and eligible dependents; describes the components of Medicare and how they work, and most importantly, how the UC medical plans coordinate with Medicare. | Frank Trueba, Health Care Facilitator and Benefits Office Manager, UCSC Benefits Office |
| Tuesday, February 24, 2015 | 2:30 pm to 4:00 pm | Earth & Marine Sciences Building, Room A340 | **Transitioning to Retirement**  
This workshop is designed for staff and non-Senate academics. A panel of retirees will focus on making the most of your retirement, what opportunities await you, available volunteer and travel programs, campus privileges, UCOP and UCSC support services and potential hurdles for finding personal fulfillment in retirement and an encore career. Bring your questions and concerns for a general discussion after the panel presentation. | UCSC Retirees Association Members Dave Dodson, Jim and Pam Carter, Virginia Lee, Sharon Dinnberger |
| Tuesday, March 3, 2015      | 2:30 pm to 4:00 pm | Interdisciplinary Sciences Building, Room 102 | **Preparing Your Savings for Retirement**  
This class will help you identify and understand your sources of income, including Social Security. During the class, you’ll learn about the effect of future health care costs in retirement. At the end of the class, you’ll be better equipped to evaluate your retirement income and expenses, and develop strategies to fill the gap. | Laura Crymble, Sr. Retirement Counselor, Fidelity Retirement Services |
| Tuesday, March 10, 2015     | 2:30 pm to 4:00 pm | Interdisciplinary Sciences Building, Room 102 | **Joining the Ranks of the Emeriti: The Nuts and Bolts of Academic Retirement**  
This session provides practical information for Senate Faculty considering retirement, including recall appointments, the importance of retirement dates, and pre-retirement negotiations. This session includes an interactive panel discussion by UCSC Emeriti. The panelists will provide specific information to assist in retirement planning, including sharing key retirement experiences influenced by pre-planning, and provide tips on how to remain connected with UCSC and with your profession after retirement. | Pamela Peterson, Assistant Vice Chancellor, Academic Personnel |

REGISTER FOR EACH CLASS ON-LINE AT EVENTS-MANAGER.UCSC.EDU