



Spring Financial Planning workshops 2008

Workshop Name: “Developing an Investment Strategy with TIAA-CREF”

4/24/08 – Chicago campus
Wieboldt Hall Room 109
Noon to 1 pm

4/25/08 – Evanston campus
Norris Center, Northwestern Room 202
Noon to 1 pm

Have you recently enrolled in the NU Basic Retirement plan and now want to take control of your asset allocation? This presentation offers a brief overview of diversification, risk tolerance, inflation, TIAA-CREF asset classes and funds, including mutual funds and life cycle funds. Additionally, it reviews the TIAA-CREF asset allocation questionnaire and explains how TIAA-CREF representatives can help determine an investor’s tolerance for risk using this questionnaire. Register for this workshop through Self Service at:

https://nuhr.northwestern.edu/psp/hr89prod_ss/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.NW_SS_TRN_REDIRECT.GBL?course=BEN014

Workshop Name: “Finding the Right Investment Strategy with Fidelity Investments”

4/24/08- Evanston campus
Norris Center, Northwestern Room 202
Noon to 1 pm

4/25/08 – Chicago campus
Wieboldt Hall, Room 109
Noon to 1 pm

What is a common stock? What is a mutual fund? What is a life cycle fund? What is the meaning of the terms asset class, asset allocation and diversification? If you are unsure of the answers, this workshop is for you. It will provide you with a solid understanding of the fundamentals of investing particularly in an up and down market, covering basic investment terminology, the nature of various investments, and the characteristics of financial markets. You will learn how to use basic investment strategies to help achieve your financial goals including compounding interest, dollar-cost averaging, portfolio re-balancing and minimizing taxes. Register for this workshop through Self Service at:

https://nuhr.northwestern.edu/psp/hr89prod_ss/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.NW_SS_TRN_REDIRECT.GBL?course=BEN015

Workshop Name: “The Services of the First Northern Credit Union”

4/30/08- Evanston campus
Norris Center, Northwestern Room 202
Noon to 1 pm

This workshop gives a general overview of the First Northern Credit Union organization, membership processes and fees. Service options and benefits of membership are also covered. Snacks and beverages will be provided.

Register for this workshop through Self Service at:

https://nuhr.northwestern.edu/psp/hr89prod_ss/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.NW_SS_TRN_REDIRECT.GBL?course=BEN013

Workshop Name: “PayFlex Information Session”

5/01/08- Evanston campus
Norris Center, Big Ten Room 104
Noon to 1 pm

5/02/08 – Chicago campus
Wieboldt Hall, Room 109
Noon to 1 pm

This workshop will be conducted by PayFlex (the FSA claims administrator) and NU Benefits Division representatives and will cover a number of topics including eligible FSA expenses, how to submit claims, how to use the debit card, what merchants qualify to accept the debit card and how to view account balances and transactions online. These sessions will include time to ask questions. Register for this workshop through Self Service at:

https://nuhr.northwestern.edu/psp/hr89prod_ss/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.NW_SS_TRN_REDIRECT.GBL?course=BEN08

Workshop Name: “Tuition planning/Financial Aid and 529 plans”

5/05/08 – Evanston campus
Norris Center, Northwestern Room 202
Noon to 1 pm

5/06/08 – Chicago campus
Wieboldt Hall Room 105
Noon to 1 pm

This workshop is co-sponsored by the NU Financial Aid Office and the NU Benefits Division and Bank of America. The goal of this workshop is to help you understand the financial aid process and aid options available to you as well as summarize the key features of the NU Portable Tuition plan for dependent children of NU employees. A representative from Bank of America will summarize 529 plans.”

Register for this workshop through Self Service at:

https://nuhr.northwestern.edu/psp/hr89prod_ss/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.NW_SS_TRN_REDIRECT.GBL?course=BEN010

Workshop Name: “Steps to take when retiring from NU”

5/06/08 – Evanston campus
Norris Center, Northwestern Room 202
Noon to 1 pm

5/09/08 – Chicago campus
Wieboldt Hall Room 109
Noon to 1 pm

Are you considering retiring from Northwestern University? If so, this workshop will cover basic steps and minimum qualifications for retiring and continuing NU sponsored health, dental and vision coverage as a retiree. Topics include: benefit plan options, premiums and enrollment procedures and deadlines. Wildcard privileges and special enrollment into Medicare Part B will also be covered.

Register for this workshop through Self Service at:

https://nuhr.northwestern.edu/psp/hr89prod_ss/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.NW_SS_TRN_REDIRECT.GBL?course=BEN011

Workshop Name : “NU Health Insurance and Medicare”

5/08/08 – Evanston campus
Norris Center, Northwestern Room 202
Noon to 1 pm

5/15/08 – Chicago campus
Wieboldt Hall Room 109
Noon to 1 pm

A Blue Cross-Blue Shield representative will discuss Northwestern’s retiree PPO health insurance plan and how it coordinates with Medicare Part A and Part B, Medicare “Assignment”, Medicare “Crossover”, Medicare “Carve-out” plans, and which plan is considered “Primary” and “Secondary.” Medicare enrollment procedures and deadlines will be reviewed as well.

Register for this workshop through Self Service at:

https://nuhr.northwestern.edu/psp/hr89prod_ss/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.NW_SS_TRN_REDIRECT.GBL?course=BEN003

Workshop Name : “Achieving a sound retirement with Fidelity Investments”

5/12/08 – Evanston campus
Norris Center, Big Ten Room 104
Noon to 1 pm

5/16/08 – Chicago campus
Wieboldt Hall Room 109
Noon to 1 pm

The goal of this workshop is to make retirement planning easier and more understandable for those considering retirement in the next 10 years. A representative from Fidelity Investments will address the following: How can I re-balance my portfolio to more accurately meet stated or readjusted savings goals? How can I evaluate my plan’s investment options? How do I estimate if I am saving enough for retirement?

Register for this workshop through Self Service at:

https://nuhr.northwestern.edu/psp/hr89prod_ss/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.NW_SS_TRN_REDIRECT.GBL?course=BEN002

Workshop Name : “Retirement Income Options with TIAA-CREF”

5/13/08 – Evanston campus
Norris Center, Big Ten Room 104
Noon to 1 pm

5/14/08 – Chicago campus
Wieboldt Hall Room 105
Noon to 1 pm

The goal of this workshop is to make retirement planning easier and more understandable for those considering retirement in the next 10 years. A representative from TIAA-CREF will address the following: Can I both annuitize and take systematic withdrawals? Should I re-allocate my funds before making an income decision? How is the periodic payment option different from systematic withdrawal?

Register for this workshop through Self Service at:

https://nuhr.northwestern.edu/psp/hr89prod_ss/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.NW_SS_TRN_REDIRECT.GBL?course=BEN004

Workshop Name : “Social Security and Financial Planning”

5/20/08 – Evanston campus
Norris Center, Northwestern Room 202
Noon to 1 pm

5/19/08 – Chicago campus
Wieboldt Hall Room 109
Noon to 1 pm

A Social Security Administration representative will summarize how your retirement income is calculated and provide a timeline and practical suggestions to help you plan and prepare for retirement.

Register for this workshop through Self Service at:

https://nuhr.northwestern.edu/psp/hr89prod_ss/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.NW_SS_TRN_REDIRECT.GBL?course=BEN001

Workshop Name : “Estate Planning 101 : Top 10 Reasons to have an Estate Plan”

5/21/08 – Chicago campus
Wieboldt Hall Room 109
Noon to 1 pm

5/22/08 – Evanston campus
Norris Center, Northwestern Room 202
Noon to 1 pm

Fact or Fiction: "Estate planning is only for the extremely wealthy?" Fiction! Estate planning may be even MORE important for those with modest income! This presentation will define "estate plan", will explain the documents that are involved in a standard estate plan, including wills, living trusts, powers of attorney and living wills and will tell you why EVERYONE needs an estate plan.

Register for this workshop through Self Service at:

https://nuhr.northwestern.edu/psp/hr89prod_ss/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.NW_SS_TRN_REDIRECT.GBL?course=BEN012