







Retirement & Financial Wellness Workshops

Date	Begin Time	End Time	Subject	Presenter	Room/Web Link
3/5/2025	8:30 AM	9:30 AM	The USI Retirement Offering <i>This session is designed for eligible USI employees seeking insights into their retirement benefits, including medical, dental and life coverage. Participants will gain knowledge about USI's retirement policy offerings, eligibility criteria and the transition process from an active employee to retiree status. The workshop aims to provide a comprehensive understanding of the available retirement benefits, empowering employees to navigate the transition effectively and make informed decisions about their retirement plans within USI.</i>	Wendy Seitz 	UC East 2219-2220
3/5/2025	10:00 AM	11:00 AM	Set your retirement date: Understand the factors to get you to your goal <i>Whether you plan to retire today or 30 years from now, it's never too early—or too late—to design the life you want. Let's explore the steps to getting you there.</i>	Mike Dooley 	https://event.on24.com/wcc/r/4860057/827E1ED413A9616ED94CADEFA66FAB2B
3/5/2025	11:30 AM	12:30 PM	Maximizing Your University Benefits – Making Them Work for You <i>Understanding and maximizing your university benefits can lead to greater financial security, well-being, and job satisfaction. This workshop will provide a comprehensive overview of key benefits, including health and wellness plans, retirement savings options, tuition assistance, and work-life balance perks. Participants will learn strategies to optimize their medical coverage, make informed retirement contributions, take advantage of professional development opportunities, and utilize employee assistance programs. The session will also cover common pitfalls, best practices, and practical tips to ensure employees fully leverage their benefits package, ultimately enhancing their personal and professional lives.</i>	Wendy Seitz 	UC East 2219-2220
3/5/2025	1:00 PM	2:00 PM	Going from Monthly to Biweekly pay: what you need to know! <i>This workshop will guide employees through the transition from a monthly to a biweekly payroll schedule, covering key topics such as understanding the differences in paycheck frequency and amounts, how benefits deductions and taxes will be impacted, and how to manage both fixed and variable expenses. Participants will learn strategies for restructuring bill payments to align with the new schedule, avoiding financial strain, setting up automatic payments, adjusting savings contributions, and effectively planning for months with three paychecks. The goal is to equip employees with practical tools to navigate this change and maintain financial stability.</i>	Shawn Robey Whitley Price 	UC East 2219-2220
3/5/2025	3:00 PM	4:00 PM	Navigating the Financial Markets <i>This session provides a review of the financial markets in 2024, an overview of the current state of the economy and the expectations for how financial markets might migrate in 2025 and beyond. The presentation aims to introduce attendees to the various nuances of investment landscapes. Topics include diversification benefits across various asset classes (stocks and bonds) as well as discuss the possible impact of the consumer, unemployment rates, inflation/interest rates and the presidential election on the financial markets.</i>	Cynthia Henderson  FIFTH THIRD BANK	https://usi.zoom.us/j/1K292eRXCsG3qBq0vLVA



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3/6/2025	9:00 AM	10:00 AM	<p>Building Financial Security – Investing, Credit, and Identity Protection</p> <p><i>Achieving financial stability requires smart investment, strong credit management, and proactive identity protection. This workshop will guide employees through key financial topics, including maximizing workplace investment opportunities like employer-sponsored retirement plans and exploring investment strategies beyond work, such as brokerage accounts and real estate. Attendees will also learn the importance of credit scores and reports, how they impact financial opportunities, and strategies for improving and maintaining strong credit. Finally, the session will cover identity theft risks, prevention techniques, and steps to take if personal information is compromised. With practical advice and actionable insights, this workshop equips employees with the knowledge to build a secure financial future.</i></p>	<p>Jacob Darr</p> 	UC East 2217-2218
3/6/2025	11:00 AM	12:00 PM	<p>Understanding Social Security</p> <p><i>This virtual session on Understanding Social Security is tailored for USI employees and their loved ones who plan to retire within the next 5-10 years, as well as individuals seeking insights into Social Security. Participants gain knowledge on the application process for Social Security Income, exploring the impact of age and wages on benefit amounts. The workshop covers key aspects such as the intersection of work and benefits, and it provides insights into survivor and disability benefits. Whether contemplating retirement or simply aiming to enhance their understanding of Social Security, attendees receive valuable information to make informed decisions about their future financial well-being.</i></p>	<p>Charo Boyd</p> 	https://usi.zoom.us/j/6547890123
3/6/2025	1:00 PM	2:00 PM	<p>Going from Monthly to Biweekly pay: what you need to know!</p> <p><i>This workshop will guide employees through the transition from a monthly to a biweekly payroll schedule, covering key topics such as understanding the differences in paycheck frequency and amounts, how benefits deductions and taxes will be impacted, and how to manage both fixed and variable expenses. Participants will learn strategies for restructuring bill payments to align with the new schedule, avoiding financial strain, setting up automatic payments, adjusting savings contributions, and effectively planning for months with three paychecks. The goal is to equip employees with practical tools to navigate this change and maintain financial stability.</i></p>	<p>Shawn Robey Whitley Price</p> 	UC East 2217-2218
3/6/2025	3:00 PM	4:00 PM	<p>Mastering Your Finances: A Guide to Budgeting Success</p> <p><i>This session is designed to guide individuals, whether beginners or experienced budgeters, in creating and adhering to a budget. It begins by highlighting the significance of budgeting in promoting financial discipline and reducing stress. The content covers fundamental aspects such as setting financial goals, understanding income and expenses, and introduces various budgeting tools. Emphasizing the importance of regular tracking and monitoring, the presentation addresses challenges like unexpected expenses and behavioral changes. It provides practical tips for staying on track, including prioritizing needs, allocating for savings and creating an emergency fund. The session concludes by empowering participants with the knowledge that budgeting is a tool for financial control and encourages ongoing learning about personal finance. The presentation aims to be inclusive and beneficial to all individuals regardless of their budgeting experience.</i></p>	<p>Chris Dunning</p> 	UC East 2217-2218