

In addition to excellent retirement options for its employees, The University of Iowa provides sound, informative, and free financial education for staff. The University Benefits Office and UI Learning and Development sponsor educational opportunities to assist staff in meeting retirement and other financial goals.

Financial Education Classes – November 2009

Building the Foundation - The Planning Center

Have you ever wondered how to become financially successful? Here is the opportunity for you to learn the ins and outs of managing cashflow through your household and to take home strategies discussed in this class to improve your financial situation. You will discover the role of cash reserves and how to manage and reduce debt. Instructor: Jim Reighley

Tuesday	11/03/2009	12:00pm - 1:00pm	Westside Location
Tuesday	11/03/2009	5:30pm - 6:30pm	Eastside Location

Women's Focus on Retirement Distributions - Liberty Brokerage Company

Lunch and Learn - This course will focus on financial concerns of women and retirement distributions. Will your savings provide the money that you need to enjoy your retirement or will daily living expenses consume most of your retirement income? When you understand your options, you may avoid costly mistakes and make more informed decisions. You will receive a free 20-page workbook when attending this seminar. A box lunch will be provided for registered participants. Instructor: Roseann Ockenfels

Thursday	11/05/2009	12:00pm - 1:00pm	Eastside Location
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Taking Control: A Financial Workshop for Women - Liberty Brokerage Company

This is an innovative educational seminar designed to address financial concerns of women and may answer many of the questions that you have about taking control and preparing for your financial future. You will receive a 147-page resource workbook when attending this 2-hour seminar. A box lunch will be provided for registered participants. Instructor: Roseann Ockenfels

Thursday	11/05/2009	5:00pm - 7:00pm	Westside Location
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Five Habits of Highly Successful Investors - TIAA-CREF

This class will provide you with a fundamental knowledge of investing. Topics will include setting financial goals, realizing tax advantages, reducing risk with diversification, and understanding expenses and current market trends. Instructor: Nancy Foster

Tuesday	11/10/2009	12:00pm - 1:00pm	Eastside Location
Tuesday	11/10/2009	5:00pm - 6:00pm	Westside Location

Building a Better Budget - UI Community Credit Union

Building a budget does not have to be difficult and sticking to it can be done if you set realistic goals and expectations. If you want to keep spending under control, building a budget is your first step to success. This class will go through four broad steps of tracking expenses, identifying income sources, building the budget, and tools for evaluating the results. Instructor: Pagelyn Howren

Thursday	11/12/2009	12:00pm - 1:00pm	Oakdale Campus
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Investment Planning: What Does Diversification Really Mean? - Mendota Financial Group

What is a truly diversified portfolio? In this class you will learn what diversification really means and the true costs of various investment vehicles. You will also come to understand the shortcomings of the Modern Portfolio Theory. Instructor: Kurt Ahrens

Thursday	11/12/2009	12:00pm - 1:00pm	Eastside Location
Thursday	11/12/2009	5:00pm - 6:00pm	Westside Location

First Time Homebuyer - UI Community Credit Union

Do you qualify to purchase your first home? This class will describe the home buying process from start to finish and will discuss the pros and cons of mortgage options. Topics include the pre-qualification process and the current stimulus incentive. There will be a question and answer period at the end of the session. Instructor: Amy Henderson

Tuesday	11/17/2009	12:00pm - 1:00pm	Eastside Location
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Dynamics of Managing Income in Retirement - The Planning Center

Participants will understand the dynamics of managing income during retirement and the different risks that retirees face compared to people who are not retired. Attend this class to learn the significant change in thinking that should occur as you approach the distribution phase of your retirement program. Instructor: Jim Reighley

Wednesday	11/18/2009	12:00pm - 1:00pm	Eastside Location
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Critical Path Planning for Retirement - The Planning Center

When will you retire? This class will help you map out a plan to retirement. You will gain an understanding of the amount of money needed when you retire and the amount of savings needed to achieve this goal. Learn the five keys to successful retirement planning. Instructor: Jim Reighley

Thursday	11/19/2009	12:00pm - 1:00pm	Oakdale Campus
Thursday	11/19/2009	5:30pm - 6:30pm	Eastside Location

Basics of Estate Planning - Raymond James Financial

Rest assured your loved ones will not be burdened by your lack of planning. This program will address basic estate planning concepts including how to reduce or eliminate costs associated with probate, taxes, and handling cases of incapacity. This program will also discuss power of attorneys, living wills, and trust, as well as the role of your estate planning team. Instructor: Chad Andrews

Tuesday	11/24/2009	12:00pm - 1:00pm	Oakdale Campus
Tuesday	11/24/2009	5:00pm - 6:00pm	Westside Location

Retirement Unlimited - Grow Your Money and Keep Your Money - Hawkeye Brokerage Center

The first half of this class will cover the barriers to growing your money and the tools that will help you manage these barriers. The second half of the class will help you define your retirement goals and values and you will learn how to unlock retirement cashflow strategies. Instructors: Brenda Barthelman / Merle Miller

Tuesday	11/24/2009	5:00pm - 7:00pm	Westside Location
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Additional Information

Free confidential financial counseling is available to UI Staff. When worrying about money is a large part of your day or night, consider a free consultation to get professional assistance. To begin the process, contact Faculty and Staff Services at 335-2085 to schedule an appointment.

TIAA-CREF provides free financial counseling to UI staff. If you would like to schedule an appointment to discuss your TIAA-CREF portfolio with a representative from the TIAA-CREF Coralville Office, call 356-8010.

Registration: Register for courses online by logging on to The University of Iowa Employee Self-Service page: <http://login.uiowa.edu/uip/login.page?service=hris.uiowa.edu/portal/>. Courses are listed under Learning and Development, My Training. Go to View Available Courses or search for a specific class. You can access a printable registration form from the University Benefits Office website at www.uiowa.edu/hr/benefits/index.html. Registrations will be confirmed six days prior to the class. If you have questions regarding online registration, or, if you would like a monthly announcement of all UI Learning & Development classes, e-mail dorian-walker@uiowa.edu.