

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 - July 2008

Bond Investing - World Trend Financial

While much focus is placed on stocks, a well-balanced investment plan will have exposure to fixed income instruments. This course will provide details on the wide variety of fixed income instruments ranging from U.S. Government issued debt to emerging market bonds.

Instructor: Tory Meiborg

Wednesday 07/09/2008 12:00pm - 1:00pm Westside Location

Planning for Retirement? What About Your Health Insurance? - Solutions Insurance

Health insurance is a large component of your financial planning model. Key topics will include: the basics about Medicare, the difference between group and individual health insurance, and decisions about retirement. University health plans will not be discussed.

Instructor: Rohan Phillips

Tuesday 07/15/2008 12:00pm - 1:00pm Westside Location

Estate Planning and Your Legacy - The Planning Center

This class is designed to help you learn about the essential elements and benefits of an estate plan to ensure that your family and financial goals are met after you die. Discover how an Ethical Will can be the most rewarding message you will ever create, both for you and those you love.

Instructors: Jim Reighley and Janice Kerkove

Wednesday 07/16/2008 12:00pm - 1:00pm Westside Location

Wednesday 07/16/2008 5:30pm - 6:30pm Eastside Location

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 cash flow 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

Monday 07/21/2008 12:00pm - 1:00pm Eastside Location

Monday 07/21/2008 5:30pm - 6:30pm Eastside Location

Investing Basics - Raymond James Financial Services

Any investment plan should start with a basic understanding of investment fundamentals. This program will help you learn how to examine your current financial situation, establish a budget, control taxes, identify and manage investment risk, and appropriately allocate your investment portfolio.

Instructor: Chad Andrews

Tuesday 07/22/2008 12:00pm - 1:00pm Eastside Location

Tuesday 07/22/2008 5:00pm - 6:00pm Westside Location

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	07/24/2008	12:00pm - 1:00pm	Westside Location
Thursday	07/24/2008	5:00pm - 6:00pm	Eastside Location

Roth Individual Retirement Accounts (IRAs) - Raymond James Financial Services, Inc.

This class reviews the eligibility requirements and the benefits of contributing to a Roth Individual Retirement Account. You will learn the tax advantages behind the Roth IRA and that choosing this investment may enhance your financial portfolio.

Instructor: Andrew Cecil

Tuesday	07/29/2008	12:00pm - 1:00pm	Oakdale Campus
Tuesday	07/29/2008	5:00pm - 6:00pm	Westside Location

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.

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.