


# November / December Calendar

The University is offering a series of retirement and financial planning information sessions starting Thursday, October 13<sup>th</sup> through Friday, December 16<sup>th</sup>, 2011. Each session will be hosted by Howard benefits staff and independent Financial Services firms Howard has evaluated and selected. The sessions will last approximately 1.5 hours and will give a basic overview the Phased Retirement Program (PRP) benefits, and financial planning considerations when planning a smooth transition from full employment to retirement. The schedule for November and December is below.

DATE	TIME	LOCATION	SIGN UP
			
<b>Monday, November, 21<sup>st</sup></b>  <b>One session</b>	<b>Session Time:</b>  <b>10:00am-11:30am</b>	<b>The Howard Center</b> <b>Room #320</b>	<b>Sign up by calling:</b> <b>202-806-1259</b>
<b>Tuesday, November, 22<sup>nd</sup></b>  <b>One session</b>	<b>Session Time:</b>  <b>3:30pm-5:00pm</b>	<b>The Howard Center</b> <b>Room #320</b>	<b>Sign up by calling:</b> <b>202-806-1259</b>
<b>Wednesday, Nov. 23<sup>rd</sup></b>  <b>No Sessions</b>	<b>Thanksgiving Holiday</b>	<b>No Sessions</b>	<b>No Sessions</b>
<b>Thursday, Nov. 24<sup>th</sup></b>  <b>No Sessions</b>	<b>Thanksgiving Holiday</b>	<b>No Sessions</b>	<b>No Sessions</b>
<b>Friday, Nov. 25<sup>th</sup></b>  <b>No Sessions</b>	<b>Thanksgiving Holiday</b>	<b>No Sessions</b>	<b>No Sessions</b>

<b>DATE</b>	<b>TIME</b>	<b>LOCATION</b>	<b>SIGN UP</b>
Tuesday, November, 29 <sup>th</sup>  One Session	Session Time:  3:30-5:00pm	The Howard Center Room #320	Sign up by calling: 202-806-1259
Wednesday, Nov. 30 <sup>th</sup>  One Session	Session Time:  10:00-11:30am	The Howard Center Room #320	Sign up by calling: 202-806-1259
Thursday, December, 1st  One Session	Session Time:  2:00pm-3:30pm	The Howard Center Room #320	Sign up by calling: 202-806-1259
Monday, December, 5 <sup>th</sup>  One Session	Session Time:  3:00pm-4:30pm	The Howard Center Room #320	Sign up by calling: 202-806-1259
Tuesday, December, 6 <sup>th</sup>  One Session	Session Time:  10:30am-12:00pm	The Howard Center Room #320	Sign up by calling: 202-806-1259
Thursday, December, 7 <sup>th</sup>  One Session	Session One: 6:00-7:30pm	The Howard Center Room #320	Sign up by calling: 202-806-1259
Friday, December, 8 <sup>th</sup>  One Session	Session One: 2:00-3:30pm	The Howard Center Room #320	Sign up by calling: 202-806-1259

DATE	TIME	LOCATION	SIGN UP
<p style="text-align: center;"><b>Monday, December, 12<sup>th</sup></b></p> <p style="text-align: center;"><b>One Session</b></p>	<p style="text-align: center;"><b>Session Time:</b></p> <p style="text-align: center;"><b>3:00pm-4:30pm</b></p>	<p style="text-align: center;"><b>The Howard Center Room #320</b></p>	<p style="text-align: center;"><b>Sign up by calling:</b></p> <p style="text-align: center;"><b>202-806-1259</b></p>
<p style="text-align: center;"><b>Tuesday, December, 13<sup>th</sup></b></p> <p style="text-align: center;"><b>One Session</b></p>	<p style="text-align: center;"><b>Session Time:</b></p> <p style="text-align: center;"><b>10:30am-12:00pm</b></p>	<p style="text-align: center;"><b>The Howard Center Room #320</b></p>	<p style="text-align: center;"><b>Sign up by calling:</b></p> <p style="text-align: center;"><b>202-806-1259</b></p>
<p style="text-align: center;"><b>Thursday, December, 15<sup>th</sup></b></p> <p style="text-align: center;"><b>One Session</b></p>	<p style="text-align: center;"><b>Session Time:</b></p> <p style="text-align: center;"><b>6:00-7:30pm</b></p>	<p style="text-align: center;"><b>The Howard Center Room #320</b></p>	<p style="text-align: center;"><b>Sign up by calling:</b></p> <p style="text-align: center;"><b>202-806-1259</b></p>
<p style="text-align: center;"><b>Friday, December, 16<sup>th</sup></b></p> <p style="text-align: center;"><b>One Session</b></p>	<p style="text-align: center;"><b>Session Time:</b></p> <p style="text-align: center;"><b>2:00-3:30pm</b></p>	<p style="text-align: center;"><b>The Howard Center Room #320</b></p>	<p style="text-align: center;"><b>Sign up by calling:</b></p> <p style="text-align: center;"><b>202-806-1259</b></p>

# Retirement & Financial Planning

## Small Group Information Sessions

### Agenda

#### PRP Overview

- Purpose
- The basic's and the process
- Key dates and application deadline

#### Benefits Overview

- Retirement benefits within the program
- Normal retirement benefits outside the program
- Social Security

#### PRP Financial Planning Resources

- Who they are?
- What do they do?
- How do they do it?
- Why would you involve them now?
- How the \$400.00 PRP benefit voucher works
- Deliverables – what to expect

#### Meet Financial Advisors

- Networking with financial advisors
- Collect collateral materials on financial planning in retirement
- Set-up one-on-one meetings with financial advisor of your choice
- Group Q & A