



Education & Resources for All Stage of Retirement Planning

Fall 2019 Schedule

We are excited to announce the Retire Well fall schedule! If you are new to the program or if you would like a refresher, sessions 2-5 are our “core” sessions that cover the similar information that was presented in the spring. Based on Focus Group feedback over the summer, we have modified the program format so that you can attend a shorter session from 11:30am – 12:30pm that is provider-specific and allows you time to speak with the presenters after the presentations from 12:30pm – 1:00pm. All presenters will provide a general overview with information that is specific to the provider they represent. A light lunch will be provided.

If you have attended the AU Retiree Benefit session or the Medicare session, please take the time to attend these sessions again as the information has changed for January 2020.

Register for any of the sessions on AsuccessfulU by clicking the session’s title. Please note that unless you are already logged into the myAU portal, you will be prompted to log on to the myAU portal. Clawed the eagle should appear at the top of the myAU portal login page. Then click the "Go to AsuccessfulU" button. You will be directed to the course registration.

Session 1: Within Reach - Transitioning from Career to Retirement: Thursday, October 3 (SIS Founders Room)

11:30 a.m. – 12:30 p.m. Joselino Cruz-Perez, AU and Hank Conway, TIAA

- So it’s time to retire, now what?
- Make some final preparations to help shift from an active career to retirement.
- From income options to taxes to health insurance, you need to be prepared.

Session 2: AU Retiree Benefits: Thursday, October 17 (Butler Boardroom)

11:30 a.m. – 12:30 p.m. Joselino Cruz-Perez, AU and Melissa Jimeno, Mercer

- Who is eligible to retire? Is there a minimum age + service eligibility requirement?
- How do I retire from AU?
- Where do I find information about retiring? Who do I contact?
- What benefits do I get from AU? How long do benefits continue after retiring?
- How much does insurance cost?

Session 3: Medicare and Medicare Exchanges: Tuesday, October 22 (Butler Boardroom)

11:30 a.m. – 12:30 p.m. Joselino Cruz-Perez, AU and Melissa Jimeno, Mercer

- What is Medicare?
- What does it cover? When does it start?
- How do I enroll?
- What is a Medicare Exchange?
- What are the differences between original Medicare and Medicare Advantage plan?

Session 4: Work-Life: Tuesday, October 29 (Kay Spiritual Center)

11:30 a.m. – 12:30 p.m. Dale Rampell, FSAP, Janice Flug, Retiree and Ann Kaiser, Retiree

- How do I restructure my time? What am I going to do with my time?
- How do I explore new hobbies and interest that I could pursue in retirement?
- What if I want to stay connected to the university after I retire?
- Where will I live? What are the housing options? Assisted living?
- Long term care insurance? What is it? Do I need it? Where do I find reputable companies to work with?
- Is succession planning my responsibility?

Session 5: Understanding Social Security: Wednesday, November 20 (Butler Boardroom)

11:30 a.m. – 12:30 p.m. Joselino Cruz-Perez, AU and Deren Reid, Fidelity

- Will I have enough money? How much will I need?
- Social Security – when will it change? Will it still be offered when I retire?
- When can I collect social security?
- How much social security income can I expect?
- I haven't met with the investment provider (TIAA or Fidelity) because I think they are trying to sell me something, but I would like to get more information and understand my 403(b) retirement account better.
- Can you simplify financial information?

Other Retire Well Activities:

Pickleball – Volley with Co-Workers: Wednesdays until December 6 (Bender Arena)

12:30 p.m. – 1:30 p.m. Practice led by Tony Roane

- Registration not required for Pickleball. Wear sneakers and comfortable clothing.
- Video explaining pickleball: <https://youtu.be/fTvPYdKZqO0>

For more information, visit the Retire Well site at www.american.edu/hr/retire-well.