Financial Wellness Symposium Session Schedule

All sessions held at the Getty Center Herculaneum

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No registration required for Getty Staff.

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Spouses and adult children of staff are invited. Registration required.

Email HR@getty.edu or call x6577 for details.

Monday, April 29th, 2019

Time	Session
10:00 – 11:15	**Navigating Student Loans** *presented by Financial Finesse* Learn strategies to possibly accelerate paying down student loan debt and explore resources to help you, including a review of refinancing and consolidation options.
12:00 – 1:15	**Managing Healthcare Now & Tomorrow** *presented by Financial Finesse* This workshop focuses on the tax benefits of HSAs and FSAs to offset out of pocket medical costs. For pre-retirees, Healthcare Marketplace plans and Medicare are reviewed.
1:30 – 2:45	**Wills, Trusts and Beneficiaries** *presented by Financial Finesse* Participants start with an assessment of their current level of estate planning and leave with an understanding of the fundamental principles of estate planning, as well as a checklist to help them have a complete plan.

Tuesday, April 30th, 2019

Time	Session
10:00 – 11:00	**Create Your Plan** *presented by Vanguard* Participants will get an idea of whether they're saving enough for retirement and review investment allocation and Vanguard's tools.
11:00 – 12:00	**Retirement Planning: An Emotional Perspective** *presented by Health Advocate* For many people, a major concern is how they will handle the social and emotional stages of retirement. This workshop reviews all the stages from pre-retirement planning (which can begin 5 – 15 years prior to retirement) to development of a new lifestyle.
12:00 – 1:00	**Timeline to Retirement** *presented by Vanguard* Participants 3 to 10 years from retirement will review the key benefits and decision points for retirement planning.
1:00 – 2:00	**The Financial Wellness Playbook** *presented by Health Advocate* Review habits that contribute to financial peace of mind, such as creating a budget, improving your credit score, and increasing your savings to decrease financial stress.

Thursday, May 2nd, 2019

Time	Session
10:00 – 11:00	**RRA Review** *presented by Optum* The Getty provides a Retiree Reimbursement Account (RRA) to eligible staff at the time of retirement. Optum will review what expenses are eligible for reimbursement and how to submit claims. Come learn how to make the most of the RRA!
11:15 – 12:15	**Retiree Panel** A Q & A format. Learn about the experiences of retired Getty staff members, who will share helpful tips and what they wish they'd known about retirement.
12:30 – 1:00	**Retiree Panel Reception**