

# Invest in Your Future:

## From New Hire to End of Career

### AFT 2121 11<sup>th</sup> Annual Financial Planning Day

#### Thursday, January 9, 2020

**Advance registration is required by January 6, 2020**  
**Register at: [www.aft2121.org/financialplanning/](http://www.aft2121.org/financialplanning/) or Phone: (415) 585-2121**

*We hope you enjoy this event and that it helps you plan for your financial future and retirement. Information tables will be located in the CCSF cafeteria, where breakfast and lunch will also be served. The schedule below lists the times of the workshops. A schedule with locations will be available the day of the event during registration. Evaluation forms will be distributed at each workshop. We would appreciate your taking the time to complete and return them. Please note that all activities are eligible for CCSF Professional Development FLEX activity credit without needing CRN numbers. Have a great day!*

<u>Registration</u> 8:00 a.m.- 8:30 a.m.	<u>CCSF Cafeteria</u> <b>Registration &amp; Continental Breakfast</b>					
<u>Welcome</u> 8:30 a.m.- 8:45 a.m.	<u>CCSF Cafeteria</u> <b>Welcoming Address: Jenny Worley</b> CCSF Professor, English Department, President AFT 2121					
<u>Rooms</u>	<u>TBD</u>	<u>TBD</u>	<u>TBD</u>	<u>TBD</u>	<u>TBD</u>	<u>TBD</u>
<u>Session I</u> 9:00 a.m.- 10:15 a.m.	1) Retirement Planning 101* ‡	2) Financial Planning Basics* †	3) CalSTRS—My Retirement Decision, 3-5 Years Out**	4) How to Retire from CCSF for Part-time employees ‡ **	5) Starting a Tax-sheltered CCSF Payroll Savings Plan*	6) Emotional Planning for Retirement** †
<u>Session II</u> 10:30 a.m.- 11:45 a.m.	7) HSS Health Benefits for Retired Full-Timers**	8) Passport to Retirement* †	9) CalSTRS—Part-timer Retirement * ‡ **	10) How to Retire from CCSF for Full-time employees**	11) Social Security and Medicare** †  [same as 17]	12) CalSTRS—403bCompare and Pension2*
<u>Lunch</u> 12:00 p.m.- 1:15 p.m.	<b>CCSF Cafeteria: Lunch 12-12:30/Keynote Speaker 12:30-1:15</b> <b>Speaker TBD</b> <b>Note: food will not be available before 12 noon</b>					
<u>Session III</u> 1:15 p.m.- 2:45 p.m.	13) Understanding the new SERP **	14) Part-time Retirement Issues* ‡ †	15) CalSTRS—My Retirement Benefits, 10-15 Years Out*	16) “What I Wish I’d Known...” ** † Panel Discussion	17) Social Security and Medicare** †  [same as 11]	18) Basic Estate Planning* †

\* Note: May be of special interest to **younger faculty**.

‡ Note: May be of special interest to part-time educators.

\*\* Note: May be of special interest to faculty approaching retirement.

† Note: May also be of special interest to retired faculty.