

LOYOLA UNIVERSITY CHICAGO

FINANCIAL WELLNESS DAYS
For Health Sciences Division [SSOM & NSON] and Credit Union

Will you be ready for retirement?

Learn about basic financial planning concepts

GENERAL SESSION: Tuesday, September 30, 2008 (11:30 a.m. - 2:30 p.m.)
Location: SSOM, Bldg. 120, Class Room 150
Vendors' Work Shop: Begins 2:30 p.m. - 4:30 p.m. (Rooms 106, 108 & 431)

RSVP
On line at
<http://www.LUC.edu/hr/events>

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Walk-In's are  
Welcomed

11:30 a.m. - 12:30 p.m.

**WELCOME**

Carolyn M. Wright, *Director, Benefits & Compensation*

- **Understanding your LUERP benefits**  
for staff employees hired on or before March 1, 2003  
Donna Piha, *Manager, LUERP*
- **Basic overview of Loyola's retirement plans**  
Carolyn M. Wright, *Director, Benefits & Compensation*  
AIG Retirement, Fidelity Investments, and TIAA-CREF

12:30 p.m. - 1:30 p.m.

**PRESENTATION**

Joseph A. Schoenhardt and James C. Hinchsliff, ChFC, CLU  
*Infinity Financial Concepts, Inc.*

- **Comprehensive financial planning:**  
Reviewing the fundamentals of financial planning
- Vision, goals, and objectives
- **Investment concepts**  
Looking for the "right" investment: Where is your money invested? Tiering approach to investing; and risk tolerance

1:30 p.m. - 1:45 p.m.

~ **BREAK** ~

1:45 p.m. - 2:30 p.m.

- Retirement Savings: a case study
- Retirement Asset Distribution
- Insurance
- Taxes and Estate
- Summary and Questions

2:30 p.m. - 4:30 p.m.

**Retirement Vendors' Work Shop Sessions** (*Agenda on reverse side*)

**ABOUT THE PRESENTERS:**

**James Hinchsliff and Joseph Schoenhardt** specializes in the distribution of assets during retirement, using a time release funding technique. They each have 20 years of experience, which as led to their success in educating people in the concept of time release funding through their presentation of educational seminars on the topic. Both Jim and Joe are certified as training leaders by the American Association of Retired Persons (A.A.R.P.) to conduct their retirement planning workshops. They are knowledgeable with Loyola's retirement plans and have provided for the past 10 years educational seminars to Loyola University and Medical Center employees, on behalf of the Credit Union.

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# FINANCIAL WELLNESS DAYS

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Tuesday, September 30, 2008

## RETIREMENT VENDORS' WORKSHOP

### Vendor Work Shop Locations:

- SSOM – Bldg. 102: Class Room 106 (AIG Retirement)
- Class Room 108 (TIAA-CREF)
- Class Room 431 (Fidelity)

*Loyola's Retirement Vendors will follow the same schedule*

## AIG Retirement, Fidelity Investments, and TIAA-CREF

(2:30 p.m. until 4:30 p.m.)

### ~~~AGENDA~~~

#### 2:30 p.m. - 2:45 p.m.

- Basic Overview of company

#### 2:45 p.m. - 3:15 p.m.

- Asset allocation
- Total deferred allowance (TDA) limits

#### 3:15 p.m. - 3:30 p.m.

#### ~~~Break~~~

#### 3:30 p.m. - 3:45 p.m.

- How to read your Retirement Savings Plan Account Statement
- How to Enroll

#### 3:45 p.m. – 4:30 p.m.

- Retirement counselors available to assist employees who are in “default status” for their 403(b) contributions (DCRP)
- Questions

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*Walk-In's are
Welcomed*

Healthy

Refreshments

Served

