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EMPLOYEE SERVICES

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Employee Services connects you with financial professionals ^[1]

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Got a nagging financial question? Let Employee Services connect you with a qualified financial professional from one of the university's retirement plan investment sponsors.

As a CU employee, you can schedule a one-on-one consultation by checking the [Employee Services events calendar](#) ^[2].

"These meetings aren't about sales; they're about education," says Katie Sauer, Financial Education Program director in Employee Services. Many participants in the university's 401(a) retirement plan are unaware that guidance on all aspects of personal finance is available to them at no individual charge.

Employee Services—the heart of employee resources for CU's system-wide workforce—pays for these sessions as part of its contracts with Fidelity, TIAA-CREF and Vanguard.

"Employees can discuss everything from monthly budgeting to debt management to retirement planning," adds Sauer.

As a reminder, the university's 403(b) voluntary retirement plan is open to all employees. In addition to selecting from among Fidelity, TIAA-CREF and Vanguard to manage their 403(b) plans, employees can choose to open accounts with American Century, Dreyfus, DWS Investments, MetLife and VALIC. Employees can access representatives from these investment sponsors, although the financial planning services available will vary, as will the mode of contact. (For example, some investment sponsors only conduct meetings online or through a call-center, while others will meet face-to-face with employees.)

PERA to offer spring workshops

The Public Employees' Retirement Association (PERA) will be visiting each campus in March. CU PERA members are invited to stop by PERA's information table or attend a PERA workshop to learn more about its retirement benefits. Although PERA doesn't currently offer general financial planning, PERA participants may schedule an appointment with Fidelity, TIAA-CREF or Vanguard.

Why attend a financial education session?

The university offers these sessions to help you make educated financial decisions and to encourage you to take advantage of the professional financial guidance that our investment sponsors offer. The personalized sessions will help you determine which financial strategies best suit your needs.

"The financial world is full of useful rules-of-thumb and general advice, but nothing substitutes for individualized planning with a professional," says Sauer.

Investment advice: not just about retirement

While many employees have only interacted with CU's investment sponsors during the university's annual "Prepare to Retire" workshops, Sauer wants to erase the perception that employer-sponsored financial planning only pertains to retirement. "It's a good idea to check in with a professional once a year or whenever you've had a major life change," she adds.

Schedule a one-on-one consultation

Schedule your personal finance session by checking the [Employee Services events calendar](#) [2] for upcoming financial consultation sessions on your campus.

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