Published on *University of Colorado* (https://www.cu.edu)

Don’t just leap into retirement, make a plan with Retirement Ready [1]



February 8, 2022 by Employee Services [2]

Like any new adventure, retirement can be exciting — and intimidating. Many of us welcome the ability to shift focus toward our loved ones and hobbies or the potential to find new interests and explore wider possibilities. But the process of retiring and ensuring our financial and medical needs will be met can feel opaque and overwhelming.

Employee Services is here to help take the mystery out of the retirement planning process. Each year, we host Retirement Ready — a series of educational sessions designed to help employees nearing retirement age make a solid plan before they take the big leap into retirement.

Anyone within five years of retirement should begin planning as soon as possible, and our Retirement Ready virtual series is a great way to jump right in. This year’s Retirement Ready presentations include webinars hosted by TIAA, PERA, Social Security and Medicare.

On-Demand Courses

Employees should prepare for the speaker series by visiting the Retirement Ready website to access retirement guides and checklists and by watching one of our retirement prep courses: **CU’s Process for Retiring: 401 (a) Participants** [3] or **CU’s Process for Retiring: PERA Participants** [4]. These courses are available year-round on the Retirement Ready homepage [5].

Webinar Schedule

In addition, be sure to register for the Retirement Ready virtual sessions that apply to your retirement plan enrollment.

- **Feb. 24 — Within Reach: Transitioning from Career to Retirement** [6]*(401(a) plan enrollees only)*: This TIAA-hosted session will cover the basic rules that govern the most common retirement accounts, when to tap into different assets and flexible income choices offered by TIAA. The presenter will also touch on estate planning, health care and the emotional impact of retirement among other topics.
- **March 2 — Pre-Retirement Planning** [7] *(PERA plan enrollees only)*: Designed for

people who are 4-6 years from retirement, this webinar details everything you need to apply for retirement with confidence. You'll learn about the details you should be considering as you come down the home stretch to retirement.

- **March 3 — Social Security Basics [8]:** Social Security is a large part of retiring — one that often leaves people confused. This presentation provides clarity on Social Security retirement benefits, pre-retirement planning and more.
- **March 11 — Medicare 101 [9]:** This presentation covers the four basic parts of Medicare: hospital insurance, medical insurance, Medicare Advantage plans and prescription drug plans. Experts will detail how Medicare works with other insurances and provide helpful informational resources.
- **March 17 — PERACare [10]** *(PERA plan enrollees only)*: Learn about the PERACare health benefits program, including eligibility, pre-Medicare and Medicare plan choices, prescription benefits and other subjects.
- **March 25 — Estate Planning Basics [11]:** This TIAA-hosted session is open to all retirement plan enrollees and is designed to help you think through important lifetime planning issues and estate planning techniques, including an overview of basic planning documents, making beneficiary designations, preparing for a time when health care and financial decisions may have to be made on your behalf, knowing what questions to ask an attorney and more.
- **March 30 — Retirement Process Meeting [12]** *(PERA plan enrollees only)*: Designed for people who are 1-2 years from retirement, this webinar outlines everything you need to apply for retirement with confidence. You'll learn about the forms you'll need to complete, how and when to submit your forms, option selection, taxes and more.

Just like any new adventure, you don't want to leave your retirement up to chance. Take advantage of these CU Retirement Ready resources and begin preparing today to make the most of your retirement.

Registration is open: Visit the Retirement Ready website [13] to view full event information and register.

PERA [14], 401(a) [15], retirement [16]
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