

“Transitioning to Retirement”—Davis campus

The road to retirement, while filled with excitement, can sometimes be unexpectedly bumpy. “Transitioning to Retirement,” with separate sessions for UC Davis faculty/academics and staff, will provide valuable information and tools for developing a successful strategy for retirement. Topics will include UC pension options, retiree health benefits, Social Security, financial planning for retirement and work/life transitions. It is recommended that participants register for the entire 4-week series, however each session is available for individual registration.

Workshop leaders will include UC Davis staff and faculty and representatives from retirement-focused organizations. “Transitioning to Retirement” is a joint project of the UC Davis Retiree Center and the Office of the Vice Provost-Academic Personnel with support from Staff Development and Professional Services.

All sessions will be held at the Walter A. Buehler Alumni Center on the UC Davis campus. Sessions for staff will be scheduled in the mornings, 9 a.m. – noon, and for faculty/academics in the afternoons, 1:30 – 4:30 p.m.

Faculty/academic sessions:

Fridays, January 15 – February 5, 2016

1:30 – 4:30 p.m.

Walter A. Buehler Alumni Center, AGR Room

Session 1: Introduction & Understanding UC Retirement Plan Income Options

Day/Date: Friday, January 15, 2015

This session will first provide an overview of the class series and information about retirement planning resources. The second part of this session will be an overview of the UC Retirement Plan (UCRP) by staff from the UC Retirement Administration Service Center. The UCRP provides retirees with a monthly lifetime pension or a lump-sum payout upon retirement. UCRP topics will include estimating your retirement income and determining options for survivor benefits.

Sue Barnes (Introduction) is the director of the UC Davis Retiree Center. In her role, she oversees programs and services that keep retirees connected to the campus and directs active employees to resources for retirement planning.

Scott Sylva is a benefits supervisor at the Retirement Administration Service Center (RASC) which provides counseling and support for all UCRP members, active, inactive, retirees and their survivors. Before becoming a supervisor, he worked as a customer service representative, long term disability case manager and a benefit analyst. Prior to working at UC, I worked with CalPERS for two years in customer service. Scott moved back to Sacramento in May 2015 and commute to Oakland on the Capital Corridor Amtrak.

Session 2: Retiree Health Care Benefits & Social Security

Day/Date: Friday, January 22, 2016

The first part of this two-part session will cover a variety of topics regarding retiree health benefits including eligibility for retiree health care benefits, an overview of benefits that continue into retirement, the cost of those benefits, relocation impacts on health benefits and coordination of the UC retiree health care plans with Medicare.

The second part of this workshop will provide an overview of Social Security benefits and programs, including retirement, survivors, disability, and auxiliary benefits. The program will include some background and history of Social Security as well as some new features of the Social Security website.

Guerren Solbach (Retiree Health Care Benefits) has been the Health Care Facilitator for UC Davis/UC Davis Health System since 2002. The Health Care Facilitator Program increases the value of UC health benefits by making them work for employees and retirees. Prior to becoming the health care facilitator, Guerren served as a benefits representative for UC Davis Employee Benefits from 1996-2002 and is a UC Davis alumnus.

Deo Santos (Social Security) is the Social Security Northern California public affairs specialist. He began his Social Security career in 2003 as a T2 claims representative and participated in numerous public speaking engagements prior to his appointment as public affairs specialist. Deo was raised in the San Francisco’s East Bay Area and finished his sociology degree at CSU Sacramento.

Session 3: Financial Planning for Retirement

Day/Date: Friday, January 29, 2016

Learn to avoid the five major risks that result from not preparing a retirement income plan—withdrawal (spending too much too soon), inflation, longevity (outliving one's savings), medical (underestimating medical expenses), and asset allocation (having the wrong investment mix). The instructor will also review robust online planning tools that can help insure that you do not outlive your assets.

***Spencer Richards**, a Fidelity workplace planning & guidance consultant since 2015, has worked at Fidelity since 2011. He was previously the retirement counselor covering UC Davis, UC Davis Medical Center, and UC Merced. Prior to joining the UC team he was the private client specialist at Fidelity's Investor Center in Roseville, California. An investment advisor representative, registered securities representative, and licensed insurance representative; Spencer holds a bachelor's degree in communications (with a minor in business) from Brigham Young University.*

Session 4: Work & Lifestyle Transitions

Day/Date: Friday, February 5, 2016

Retirement is a time of great expectations but also a time of significant change. As you ready for this next phase of life you might find it to be a challenging transition, even if you have planned for it and are looking forward to it. In the first part of this session, you will learn strategies for successfully navigating the change and thriving emotionally, socially, and intellectually. The second part of this session will include information on emeriti rights and privileges as well as an overview of opportunities for continued involvement with the university and a panel of retired faculty/academics.

Beth A. Cohen, Ph.D. is a clinical and organizational psychologist. She recently began working at UC Santa Barbara, Human Resources, as well as UC Davis Occupational Health Services, after serving as the director of the UC Davis Academic and Staff Assistance Program. Dr. Cohen was the founder and CEO of Pacific Coast Behavioral Health, P.C., a multi-faceted psychological services corporation in Southern California where she designed and managed the Division for Senior Care (DSC), a community program to address the psychological components of aging. Dr. Cohen has used her 28 years of expertise in organizational and individual health and well-being to assess needs, design interventions, develop programs, and train managers and staff in higher education as well as the private and public sectors.

Maureen Stanton has been on the faculty at UC Davis since 1982. She graduated from Stanford in 1975 with a B.S. in Biological Sciences and from Harvard in 1980 with a Ph.D. in Biology. After a postdoctoral fellowship at Yale, she joined the Botany Department at UC Davis, and later moved to the new Department of Evolution and Ecology in 1991. She served as director of the Center for Population Biology 1992-1997, and then as chair of the Department of Evolution and Ecology 2006-2011. In January 2012, she became vice provost-academic affairs. Maureen's research focuses at the interface of ecology and evolutionary biology, especially with respect to plant-animal interactions and plant adaptation to the environment.