Online Financial Wellness Education Opportunities for CWRU Faculty & Staff – Fall 2018

In lieu of participating in an on-campus Financial Wellness education series this fall, use of the Impact Solutions financial resources, or TIAA webinars, will be approved substitutions. Please use the access information below to learn more about financial well-being. We ask that all people using this participation to count towards the Wellness Program Incentive for Financial Well-being keep track of all tutorials completed and webinars watched (in case we ever need to audit program incentive recipients). I hope that you find this information helpful. We will be sending a survey in early November to learn more about your experiences using this online information.

Please feel free to direct questions and comments to: Elizabeth Click, erc10@case.edu, 368-5790.

1) Employee Assistance Program (EAP), Impact Solutions

Case Western Reserve University has contracted with a new Employee Assistance Program (EAP) vendor, Impact Solutions, as of July 1, 2018. In addition to offering enhanced counseling support (e.g., 5 free sessions per problem per year for employees and household dependents), Impact Solutions offers a variety of consultation services (e.g., Child Care, Elder Care, Legal, Finance) and their online portal offers a wealth of educational, assessment and video tools.

Impact Solutions Online Portal Access Instructions

1) Go to www.MyImpactSolution.com
2) Click on "Go to member login" (orange block in the top right corner) and enter "CWRU" in the "Member login/Username" block.

Financial Fitness Center Information & Access

From the main page, scroll down to the green tile titled "Financial Fitness Center" and click on that tile.

This center offers a Financial Fitness Checkup (10 minute brief assessment) and >200 interactive tutorials (content to reach and quizzes to complete) on a wide variety of topics within the Savings & Investment tile (green) and the Personal Finance tile (blue). Details about each tile are below:

1) Savings & Investment Tile
   a. 6 Topic Areas. Number of interactive tutorials in each area within ( ).
      i. Basics (16)
      ii. Strategy (26)
      iii. Stocks (6)
      iv. Income (19)
      v. Funds (18)
      vi. Analysis (13)

2) Personal Finance Tile
   a. 6 Topic Areas. Number of interactive tutorials in each area within ( ).
      i. Basics (37)
      ii. Planning (51)
      iii. Benefits (18)

iv. Healthcare (13)
v. Retirement (42)
vi. Education (3)

3) Completion Requirement = 24 tutorials

Webinar Information & Access

From the main page, scroll down to the blue "Webinars" tile at the bottom left and click on that tile.

This area offers a wide variety of educational webinars on a large number of topics. On the first page, you will notice that the October webinar is titled "Investing 101". You will be able to access that webinar as of October 1st.

If you click on the link at the top titled "Click here to view all archived Webinars", you will find many additional webinars.

Click on the "**Webinars**" tab on the right and look for these titles:

1) **It's My Budget and I'm Sticking To It** (59 minutes)
2) **Managing Money with Your Partner** (58 minutes)
3) **Maximizing Your Social Security Benefits** (1 hour)
4) **Money Basics** (59 minutes)
5) **Money Basics: Spending, Borrowing and Saving It** (1 hour)
6) **New Year – New You: 10 Financial Resolutions You Can Actually Keep** (1 hour)
7) **Paying for College** (57 minutes)

Completion Requirement = at least 7 webinars

OR

A Combination of Webinars and Tutorials [3 tutorials = 1 webinar]

OR

2) TIAA Retirement Funds Manager Webinars

TIAA is one of two retirement fund managers for CWRU. Monthly webinars are offered for educational purposes. In addition, one-on-one consultation sessions are offered throughout the year. Click here for that schedule.

Employees can register to attend a webinar at: **www.tiaa.org/webinars.**

To Register for TIAA webinars:

1. Visit **www.tiaa.org/webinars**
2. Under **Guest Access** click Register for Guest access

3. Enter first name, last name, Email and a password of their choice
4. You will be taken directly into the Live Webinar Lounge where you can register for the webinar and add it to your calendar.

Responsible investing
Responsible Investment aims to incorporate environmental, social and governance (ESG) factors into investment decisions, to better manage risk and generate sustainable, long-term returns. Learn ways for you to consider incorporating RI practices into your investments strategies.
September 13 at 12 p.m. (ET)

Estate planning basics
Ensuring that our assets will pass to loved ones and causes that are near and dear is important to most of us. Discover the basic estate planning components and strategies to ensure that your wishes are met.
September 25 at 12 p.m. (ET)

Market-proof your retirement
Am I overexposed to market losses? Will I outlive my money? Am I confident that I can retire on my terms? In retirement—and the years leading up to it—protecting your savings becomes just as important as growing it. Join this webinar and see how you can market-proof your retirement.
September 17 at 12 p.m. (ET)

She's Got It: A woman's guide to saving and investing
You can discover saving and investing strategies developed especially for women and how you can put them into action.
September 25 at 3 p.m. (ET)

The 411 on 529 college savings plans You can learn all about how 529 college savings plans work and how to invest in one for a child, grandchild, yourself or other loved one.
September 26 at 12 p.m. (ET)

Money at Work 1: Foundations of Investing
Discover how you can manage risk versus reward, as well as understand the role of investing and managing risks, ways to help accelerate savings and tools that can help sustain a portfolio.
September 26 at 3 p.m. (ET)

Hacking the human – Cybersecurity and you TIAA's Senior Lead Information Security Manager will discuss how behavioral psychology can be used by hackers for identity theft, account compromise, and impersonation. Learn how you can protect yourself and your family from cybercriminal social engineering.
September 27 at 12 p.m. (ET)

The Starting Line: Beginning to save for retirement

You can learn how to evaluate and manage debt, find additional ways to save, create a budget and begin to plan for retirement.
September 27 at 3 p.m. (ET)

Completion Requirement = at least 7 webinars