



# Benefits Alert

October 1, 2008

A Benefits News Bulletin from Human Resource Services

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## Personal Financial Basics Workshop

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Human Resource Services has made arrangements with California Public Employees' Retirement System (CalPERS) to conduct a Personal Financial Basic Workshop for Cal Poly Pomona employees. The Personal Financial Basic Workshop presentation is for 2 hours on the Financial Basic program and the workshop is developed and delivered by a highly experienced, non-practicing Certified Financial Planner. **This seminar only educates; it does not sell any product.** Subjects covered at the workshop include the following:

**Introduction** – A brief overview of the CalPERS program and an introduction to CalPERS workshops available On-Line or Live.

**Personal Financial Basics** – An introduction to basic money management and debt control. Before you invest, it is important to make sure you are using credit wisely and driving down the amount owed to creditors. Personal Financial Basics will provide you with an excellent foundation for getting your financial life in order. You can apply the concepts learned in the workshop to get out of debt and manage money better in the future to stay financially healthy and begin saving for retirement.

**NEW:** CalPERS asks that all employees go to their website and complete the on-line registration process. Employees must complete this one-time registration process prior to enrolling in this or future classes or workshops offered by CalPERS. To attend this and future CalPERS workshops, employees must enroll on-line.

**\*\*Please see the reverse side for complete instructions on: (1) How to register with CalPERS and (2) How to enroll in CalPERS classes or workshops.**

Seating for this workshop is limited to forty (40) employees. To ensure a spot enroll on-line now!

## Personal Financial Basics

Wednesday, November 5, 2008

1:30 PM – 3:30 PM

Heritage Conference Center, CLA Building 98, 8<sup>th</sup> floor

*The Personal Financial Basics workshop is one of a multitude of CalPERS financial workshops. If you have attended the Personal Financial Basics and/or Achieving your Dream Retirement workshop in the past, you are most welcome to attend this one as well. There is no pre-requirement for these workshops and they can be taken in any order.*

*For campus-wide distribution.*

To track member education and to receive credit for attending educational workshops CalPERS is requiring that members (1) register on-line at the CalPERS website and (2) enroll on-line for classes/workshops presented and/or coordinated by CalPERS.

To enroll for a class/workshop you must **first register** with CalPERS for on-line access by visiting their website at [www.calpers.ca.gov](http://www.calpers.ca.gov) and clicking on “**Register Now**”. You need to register only once. To register you will need a user ID and a six digit numeric password. Follow the prompts and directions provided on-line by CalPERS.

**\*\* If you are unable to register or need assistance in registering and/or enrolling in a class, please call CalPERS at (888) 225-7377.**

**Once registered**, you may enroll in a class/workshop by using the following steps:

- Click on **Log-in** and select “**On-line Services – CalPERS Members only**”.
- Enter **User ID** and **Password** and click on “**continue**”.
- The system will prompt “**you have successfully logged in**” click on “**continue**”. This will take you back to the main page. Your name will be displayed on the right-hand side of the screen.
- Under on-line service menu, select “**CalPERS Education Center**” (if you get security warning, click “yes”).
- Click on “**Select a Class**”.
- Place a check mark by “**Display Classes sponsored by employers**” (it takes about 30 seconds before the page is refreshed).
- Scroll down to find **Cal Poly Pomona** classes/workshops.
- Select the class you want to enroll in, the system will open up a page with the class schedule and will show the number of seats available.
- If seat is available, click on “**Enroll**”
- Complete the enrollment form and place a check mark for an e-mail confirmation and enter your **email address**.
- Click “**Next**”. The enrollment summary page will open up for your review and you will have the option to edit your information.
- When information is correct, scroll down to the bottom of the page and click on “**Submit**”. You will receive a confirmation email from CalPERS within few minutes.
- At this point you may enroll in another class/workshop, review other information on your account or just simply log-out.

For workshop information, please contact Nancy Kitamura, Benefits Assistant, at [nskitamura@csupomona.edu](mailto:nskitamura@csupomona.edu) / (909) 869-3734 or Ghazala Khan, Benefits Analyst, at [gkkhan@csupomona.edu](mailto:gkkhan@csupomona.edu) / (909) 869-3735.

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