



Friday, April 11, 2003

## Retirement counselors to visit campus

By **Jeff Samoray**, OU Web Writer

To help Oakland University employees shape their retirement goals and make the most of the OU 403 (b) Tax Deferred Account, **University Human Resources** (UHR) has invited representatives from **Fidelity Investments** and **TIAA-CREF** to campus.

Employees can schedule an individual consultation with a Fidelity retirement counselor on Wednesday, April 16, between 9 a.m. and 5 p.m. in the UHR conference room, 138 North Foundation Hall, to discuss their accounts. The counselor will have information about many investment options to help you diversify your portfolio, assist you with retirement planning decisions, perform a gap analysis for your existing account, and provide a simple approach to managing your assets using Fidelity Freedom Funds.

Reservations are necessary and can be scheduled by calling (800) 642-7131. Employees should bring their latest account statement and allow 45 minutes for the consultation.

In addition, TIAA-CREF will hold two "Getting Started on Retirement Planning" seminars on Tuesday, May 20, in the Oakland Center Lake Michigan Room. The one-hour seminars are at 10 a.m. and 2 p.m. No reservations are necessary.

Employees also may schedule one-on-one consultations with TIAA-CREF Senior Consulting Officer Fernando Ortiz on Tuesday, May 27, and Tuesday, June 24, between 9 a.m. and 5 p.m. in the UHR conference room. Ortiz began his career with TIAA-CREF in 1992 and is also an adjunct professor at OU with the Personal Financial Planning program.

Reservations are necessary and may be scheduled by calling (800) 842-2044 or by visiting the **TIAA-CREF** Web site and clicking on Meetings/Counseling. Employees should bring their latest account statement and other recent statements from other investment accounts or retirement plans.

### SUMMARY

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