



401k/457(b) Retirement Plan Lunch & Learn Webinars

Martha Ocampo, your CalHR Savings Plus 401k/ 457 Retirement Specialist, will be hosting educational webinars regarding 401k/ 457(b) retirement plan which can be viewed on your own computer. Attend to learn more about the basics of your plan! Scroll down for the link to register.

Enrolling in Savings Plus Webinar – Wednesday, **July 27th, 2022**, or Tuesday, **August 16th, 2022**, at Noon

- Understand how a 401(k) or 457 fits into your retirement plan
- Learn the difference between 401(k) and 457 Plans
- Find out the difference between pre-tax and Roth savings
- Enroll in the plan of your choice

Nearing Retirement Webinar- Thursday, **July 28th, 2022**, at Noon

- Learn how to maximize deferrals in your final years of employment
- Discover the tax consequences of making withdrawals in retirement
- Find out why transferring out to an IRA might nullify many of the benefits of the state 401(k) and 457 Plans
- Understand the different strategies of investing after retirement

Lump Sum Separation and 457 TCU Catch Up Webinar- NEW! Tuesday, **August 23rd, 2022**, at Noon

- Learn how to transfer Lump Sum into your Savings Plus account(s) pre-tax
- Find out how to use Lump Sum with Catch-Up
- See if you are eligible to double your Catch-Up contribution for up to three years in the 457(b) Plan Tuition
No cost

To register for a webinar:

https://edd_oceanside.timetap.com

****Link for webinar will be provided in confirmation and reminder email once you are registered.****

If you have specific questions on your Savings Plus account, use the link below to make a one-on-one phone appointment to speak with Martha individually. Use the link below to register for an over-the-phone appointment:

https://marthaocampo_phoneappt.myretirementappt.com

These are virtual and will not be held in person.

If you have any questions, please contact Martha Ocampo at martha.ocampo@nationwide.com.

Nationwide Retirement Specialists cannot offer investment, tax or legal advice. You should consult your own counsel before making retirement plan decisions. **