

SUMMER RETIREMENT READINESS SERIES

Your Passport to Retirement

Session 5 of 10 • Retirement Ready: Income, Savings & Financial Planning

 **Tuesday, July 14** | Noon – 1 p.m. | Virtual via Microsoft Teams

 [Registration Link](#)

Your retirement journey starts here.

The **Summer Retirement Readiness Series: Your Passport to the Next Chapter** is a 10-part webinar series designed to guide Pitt employees through every aspect of planning for and transitioning into retirement. Each session takes a deeper dive into a specific topic, giving you the knowledge and tools you need to retire with confidence.

In Session #5, our subject matter experts will cover:

- **Understanding retirement accounts** – a breakdown of 403(b), 401(a), Pre-Tax and Roth options and how each fits into your retirement plan
- **Investment fundamentals and diversification** – key principles for building a balanced portfolio that supports long-term retirement income
- **Annuities vs. fixed income strategies** – comparing options for generating steady, reliable income in retirement
- **How much income you'll need** – estimating your retirement income needs and whether your savings are on track
- **Withdrawals and distributions** – how to access funds once you retire, including RMDs, loans, and distribution strategies
- **Beneficiary designations** – why keeping your beneficiaries up to date matters and key considerations to keep in mind
- **Planning tools and resources** – budgeting tools, TIAA offerings, and how to work with a financial advisor

There will also be time at the end of the session for live Q&A.

This series is open to all Pitt employees.

REGISTER NOW →

After registering, you'll receive a confirmation email with instructions on how to join the session. This session will be recorded, and slides made available following the session on the [Retirement Readiness](#) webpage.

[Download the Passport \(PDF\)](#) to keep track of your progress and take notes!

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Presented by the Office of Human Resources, Benefits Department