



## You're Invited to a Financial Fair

### What

You're invited to attend a pilot program designed to give you a day devoted to helping you learn more about investing, finances, retirement and how to plan for a more secure financial future. Spouses/partners are also welcome. When you attend, you'll get:

- Life changing financial workshops
- Fun prizes and giveaway items

### When/Where

Saturday, March 24

9:00 a.m. – 3:00 p.m.

SLAC, 2575 Sand Hill Road

### The day's schedule

#### **9:00 – 9:30 a.m.**

##### **Lobby of Panofsky Auditorium**

Time to talk with representatives from your financial partners (Fidelity, Vanguard, TIAA-CREF, Stanford Federal Credit Union and the Benefits Department)

#### **9:30 a.m.**

##### **Keynote Address – in Panofsky Auditorium**

#### **10:00 a.m. – Noon**

##### **Workshops in Redwood Conference Rooms, ROB (Bldg 48)**

- Tax Planning for 2007 and Beyond
- Smart Strategies for your 403(b) Retirement Plan

#### **Noon – 1:00 p.m.**

##### **Break – Time to talk with representatives from your financial partners**

#### **1:00 – 3:00 p.m.**

##### **Workshops in the Redwood Conference Rooms, ROB (Bldg 48)**

- Tax Planning for 2007 and Beyond (repeat)
- Selecting Mutual Funds for your Portfolio

– Over –

A summary of each workshop is included on back along with how to register.

### Tax Planning for 2007 and Beyond

Participants who attend this course will be better able to understand key provisions of the current tax law through relevant, real-life illustrations, and workbook exercises. You will learn the tax implications affecting retirement, investments, homes, charitable giving, estate planning, education, and children. to minimize your taxes.

### Smart Strategies for your 403(b) Retirement Plan

Participants who attend this course will gain an understanding of which 403(b) plan investments and strategies are most appropriate to achieve your financial goals. In addition, you will gain confidence in your ability to develop and modify your own 403(b) plan investment portfolios.

### Selecting Mutual Funds for Your Portfolio

Participants attending this course will gain more in-depth knowledge of important factors when selecting mutual fund investments. By using real life examples and exercises, you will attain important skills for future investment selections.

Workbooks – A workbook is included with each class, which reviews all covered topics and provides resources and a glossary for future use.



To Register for a Workshop

Sitting is limited. To assure a space in the workshops you would like to attend, enroll through STARS. Go to <http://axess.stanford.edu> and look for the course under Benefits. If you have a problem enrolling, call extension 5-8479.

You will need the class number to enroll.

Class name	Time	Class #
Tax Planning for 2007 and Beyond	10:00 a.m. – noon	BEN-1045-032407
Smart Strategies for your 403(b) Plan	10:00 a.m. – noon	BEN-1030-032407
Tax Planning for 2007 and Beyond	1:00 p.m. – 3:00 p.m.	BEN-1045-032407
Selecting Mutual Funds for Your Portfolio	1:00 p.m. – 3:00 p.m.	BEN-1035-032407