



Benefits Alert

May 5, 2008

A Benefits News Bulletin from Human Resource Services

“Investment Basics” Workshop

The Benefits Office has made arrangements with California Public Employees’ Retirement System (CalPERS) to conduct an “Investment Basics” workshop for Cal Poly Pomona employees. This Workshop presentation is for 2 hours and it 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.

Investment Basics – This workshop lays the investing foundation with concepts like dollar-cost averaging and the time value of money. You will also learn the differences between stocks, bonds, and mutual funds, and the role each investment type can play in your portfolio to help you achieve short, medium and long term financial goals. After attending the workshop, you will be able to decide how and where to invest money to achieve financial goals.

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

**Investment Basics
Tuesday, June 3, 2008
1:30 PM – 3:30 PM
Heritage Conference Center, CLA Building 98, 8th floor**

The Investment 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.

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

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 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.

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

1. Log into CalPERS on-line www.calpers.ca.gov
2. Access MY CalPERS and Log In (Using user ID and password)
3. My Education
4. Select a Class
5. Select **Glendale Regional Office** (Drop down arrow)
6. Check box: **Display classes sponsored by Employers**
7. Scroll down to select: **Investment Basics** (Cal Poly Pomona)
8. Click on enroll, continue and complete with your personal information.

****As you go through the above process and you are unable to register or need assistance in registering or enrolling into a class, please call CalPERS at (888) 225-7377.**

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