

URS In-Person One-on-One Sessions!

Utah Retirement Systems will be available for one-on-one retirement planning sessions or for the new financial wellness sessions at the **Aggies Conference in the HR Building**. The available one-on-one sessions are limited, so don't delay signing up, and appointment registration is in advance through your myURS account. There are two types of sessions to choose from:

The Individual Retirement Planning Sessions are designed for ALL career stages: beginning, middle, end, to help you get an idea of how much income you are on track to replace in retirement from pension (if applicable), retirement savings plans, and Social Security.

The new Financial Wellness Sessions have a different focus and are designed to help you reduce your financial stress by focusing on three key areas: Debts, Emergency Savings, and Spending.

Please follow the instructions below to register for an appointment. Appointments fill quickly so don't delay; However, counseling sessions will be made available on a regular basis and are available at other locations including options for virtual meetings. You will find all available sessions listed on the URS website in your myURS account under Education.

To register for an appointment:

1. Go to www.urs.org.
2. Log into your *myURS* account.
3. Click on the Education Tab.
4. Click on either "Individual Retirement Planning Sessions" or "Individual Financial Wellness Sessions".
5. Find the date and time that works best for you.
6. Complete the Investor Profile for the Individual Retirement Planning Session or the Financial Wellness Profile for the Financial Wellness Session. (You will be directed to the online questionnaires as you register for your appointment.)
7. For the Individual Retirement Planning Sessions, please have the following with you for your appointment:

- » **your current gross pay rate (contract year salary for school members), and 3 to 5 highest years if close to retirement (contract years for school members),**
- » **any retirement plan balances outside of URS,**
- » **your URS account log in information (user ID and password) your Social Security statement. You can get yours at www.ssa.gov.**