

**Revision Date: September 2018 – State Reference Guide**  
**Chapter: Education and Other Resources**

**Section: CalPERS Education and Events**  
**Page: 140**

**Legend: Deleted/Replaced – Added/Revised**

## **Educational Resources**

### **Employer-Sponsored Retirement Planning Classes for Members**

CalPERS Regional Office staff conduct employer-sponsored retirement planning classes at the employer's facility. The class provides customized explanations of the employee benefits offered by the employer. A minimum audience of 20 is recommended to request an employer-sponsored class. If the audience will be less than 20, please contact CalPERS.

To request an employer-sponsored class, call the CalPERS Customer Contact Center at **888 CalPERS** (or **888-225-7377**).

### **Retirement Classes for Members**

We offer five classes that are available either online or as instructor-led classes throughout California to help members prepare for retirement. Each of the classes is based on a member's career life cycle. Your employees can explore and enroll in classes through our user-friendly enrollment platform. Once logged into their my|CalPERS account, they can use our intuitive Education Resources tab to View Classes and learn what classes are available. They can also enroll by calling the CalPERS Customer Contact Center at **888 CalPERS** (or **888-225-7377**). ~~We offer six classes that are available either online or as instructor-led classes throughout California to help members prepare for retirement. Each of the classes is based on a member's career life cycle.~~

### **Your CalPERS and You**

Whether your employees are early or midway through their career, the earlier they develop a better understanding of their CalPERS benefits, the more prepared they will be to plan for their retirement. Your employees will learn about their retirement income sources, how their pension is calculated, purchasing service credit, the importance of having a power of attorney on file, what happens if they leave their employer and much more.

### **New CalPERS Member**

~~This class is for members who are new to the CalPERS retirement system. Members receive an overview of CalPERS programs and benefits.~~

### **Continuing CalPERS Member**

~~This class is for members who are not yet ready to retire but want more information about CalPERS benefits and programs.~~

### **Planning Your Retirement**

Retiring is a significant milestone in a person's life so this class is designed for those employees nearing retirement to help them plan and prepare for retirement so they can answer one of the most important questions, "When can I retire?" This class will provide information on what steps to take before that important day. Subjects include how their retirement is calculated, their retirement payment options, the importance of having a power of attorney on file, CalPERS health benefits, and more. ~~This class is for members nearing retirement and is designed to help members plan and prepare for retirement.~~

### **Completing Your Retirement Application**

~~This class is for members who are ready to retire. It provides detailed information on the step-by-step process of filling out the retirement application.~~

### **Completing Your Disability Retirement Application (Online only)**

Did you know that your employees or someone on their behalf, can file a Disability Retirement Election Application for their retirement? If they have a disabling injury or illness that prevents them from performing their usual job duties with their current employer, they may be eligible for disability retirement. In this class, your employees will learn how and when to apply, which forms to complete based on their personal situation and the importance of having a power of attorney on file.

~~This class is for members who need to complete the Disability Retirement Application forms and submit a complete application package.~~

### **Benefits Basics (Employer requested instructor-led only)**

This class provides a general overview of CalPERS benefits and the choices your employees have, to maximize their retirement security.

### **~~Retired CalPERS Member~~**

~~This class is for members who have already retired. The class provides retirees with information about CalPERS programs and provides a refresher on retirement benefits.~~

### **How to Enroll**

Advise your employees to log into their my|CalPERS account, select the Education Resource tab, "View Classes" link to find a class that is convenient for them.

### **Webinars**

Did you know that your employees can take advantage of our free monthly webinars? Visit our website at [www.calpers.ca.gov](http://www.calpers.ca.gov) to see a list of our upcoming webinars. Monthly webinars are released as videos on our CalPERS Videos on our YouTube channel for future viewing. ~~CalPERS provides monthly webinars on a variety of topics as a convenient learning resource. Visit the website under Member Education to register. Webinar examples include:~~

- ~~Planning Your Retirement~~
- ~~Your Retirement Application and Options~~
- ~~CalPERS Members — Early Career Basics~~
- ~~Power of Attorney~~
- ~~Service Credit Purchase~~

~~Recorded webinars will be available for future on-demand viewing at the YouTube channel under the CalPERS Network.~~

### **CalPERS Benefits Education Events**

Because we understand that planning and education are crucial components to making sound decisions, we offer free educational events about CalPERS benefits and programs to your employees at every stage of their career path.

The CalPERS Benefits Education Events (CBEEs) are offered throughout the State of California and provide informative event classes such as, Retirement & Health Benefits, Social Security, my|CalPERS & Your Retirement Options and Deferred Compensation that are uniquely tailored for employees who are early through mid-career as well as for those nearing retirement.

These popular events are designed to reach out to your employees who show an early interest in planning for their eventual retirement as well as for those nearing retirement. Your employees will have the opportunity to attend and ask questions about their benefits along with what steps they need to take for the next phase of their career from CalPERS representatives and partner organizations.

For more information, select "Attend Training & Events" under the "I Want To" column to visit the CalPERS Benefits Education Events page on the CalPERS website.

CalPERS Benefits Education Events (CBEEs) are held throughout the state and open to members at all career stages.

CBEEs provide informative event classes uniquely tailored for those early through mid-career as well as those nearing retirement. Members learn about health benefits, retirement benefits, and deferred compensation along with informational classes on Social Security and myCalPERS.

Members will also have the opportunity to speak with representatives from CalPERS and our partner organizations.

For more information, select "Attend Training & Events" under the "I Want To" column to visit the CalPERS Benefits Education Events page at the CalPERS website.

### **Member Education Bulletin**

CalPERS Email Subscriptions are your direct link to the latest CalPERS news and information. Stay informed about our free educational opportunities.

Subscribe to the Member Education Bulletin to help you and your employees know about upcoming member education offerings. This email bulletin provides information about upcoming CalPERS education events such as: webinars, Instructor-led classes and CalPERS Benefits Education Events (CBEE'S). Share this useful tool with your employees so they can get connected to great educational opportunities.

To receive educational event notifications in the future, your employees can subscribe to our Member Education Bulletin. To do so, visit our website at [www.calpers.ca.gov](http://www.calpers.ca.gov), scroll down to Subscribe, enter your email address, select Subscribe and follow the simple steps to complete your subscription. Subscriptions are also available for Board Meeting Notice & Agenda Alerts, Employer Bulletin and CalPERS News.

To help you and your employees know about upcoming member education offerings, subscribe to our Member Education Bulletin. Visit our website, scroll down to Subscribe and follow the simple steps to complete your subscription. Stay informed about your member education opportunities.

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