

Financial Planning Resources

Financial Advisor Reimbursement – As part of your benefits, USF offers up to \$200 per calendar year for consulting services from a financial advisor of your choice. You can seek professional assistance from a financial advisor regarding financial objectives that include tax planning, asset allocation, and/or retirement planning. In order to receive this reimbursement, you must submit your request, with a copy of your invoice, to Ron Chin (rchin2@usfca.edu) by **8/15/2020**. For more information on this benefit and how to choose a financial advisor, please visit [Financial Advisor Reimbursement Program](#)

TIAA – You can schedule a complimentary phone or virtual meeting with a TIAA Financial Consultant with advice and education tailored to your needs. To meet with a financial consultant, sign up online at TIAA.org/schedulenow or call 1-800-732-8353. To access your TIAA retirement account, please visit [TIAA](#).

Fidelity – You can receive confidential consultations from a Fidelity Retirement Planner. Please call 1-800-642-7131 to schedule an appointment. To access your Fidelity retirement account, please visit [Fidelity](#)

Emeriti – If you are an Emeriti participant, please visit [Emeriti Health](#) or call 1-866-EMERITI (1-866-363-7484).

Medicare – Medicare is a health insurance program for individuals age 65 or older. The program helps with the cost of health care, but does not cover all medical expenses. For more information, please visit [Medicare](#) or call 1-800-MEDICARE (1-800-633-4227).

HICAP – Health Insurance Counseling and Advocacy Program (HICAP) is a non-profit that provides free educational presentations on Medicare. Trained volunteer counselors can answer questions and help you understand your Medicare rights and benefits, Medicare supplemental insurance, Medicare Advantage Plan and long term care insurance. For more information, please visit [HICAP](#) or call 1-800-434-0222.

Social Security Administration – Social security provides replacement income for qualified retirees and their families. To better understand the program, the application process and the online tools and resources available to you, visit [Social Security](#) or call 1-800-772-1213.

Financial Planners - For a list of Certified Financial Planners please go to [FPA Planner Search](#).