Financial Wellness Resources

1:1 Financial Consultations

All USC employees are eligible for free 1:1 financial consultations from any of the USC-affiliated 403(b) vendors: TIAA, Fidelity, Vanguard or a USC Retirement Planning Specialist.

- Visit this website to schedule a financial consultation with **TIAA.**
- Visit this website to schedule a financial consultation with **Fidelity.**
- Visit this website to schedule a financial consultation with **Vanguard.**
- Visit one of the following links to meet with a USC Retirement Planning Specialist:
  - Retirement Plan Assistance (Virtual)
  - Retirement Plan Assistance (In-Person)
    - USC Retirement Plan Administration can be reached at (213) 821-8100 for inquiries about educational opportunities. Submit a question via email at uschr@usc.edu or rpadmin@usc.edu

Financial Wellness Resources

There are a wide array of wellness resources available from USC-affiliated 403(b) vendors.

- Fidelity
  - If you are a Fidelity plan participant, visit this website for more resources on financial wellness.
  - For non-plan participants, visit this website.
- TIAA
  - If you are a TIAA plan participant, visit this website for more resources on financial wellness.
  - For non-plan participants, visit this website.
  - To register for upcoming webinars and events or to see past events from TIAA, visit this website.
- Vanguard
  - Open to everyone regardless of plan participation, visit Vanguard's website for more support on your financial wellness.

USC Credit Union

USC Credit Union has a rich website of educational financial wellness resources. The resources are accessible by members as well as non-members. Topics include banking resources, borrowing resources, student loan counseling, debt management plans, and many more. Visit this website for more details.

USC's retirement planning week recordings

USC, in partnership with Vanguard, TIAA, and Fidelity, prepared a retirement workshop series which covered topics such as how to plan a successful retirement, getting on track for retirement, social security 101, and much more. Visit this website to view all past videos from the spring retirement workshop series.

Personal Finance Webinar (Keck Employees only)

Keck Medicine of USC's Community of Mentors for Professional Advancement, Support and Success (COMPASS) hosted a personal finance seminar in November 2022 to help audiences develop strategies early for a long-term payoff. The virtual event, led by Ryan MacDonald, director of business development for USC Credit Union, and Ekta Vyas, PhD, MS, chief human resources officer for Keck Medicine, can be viewed here.

Note, you will need a med.usc.edu email to view the recording. If you are not able to view the recording, the article on this webpage summarizes the event nicely with three profitable takeaways.