

University 403(b) One on One Financial Counseling Sessions

Vendor	Campus	Location	To Schedule an Appointment	Session Date
AIG Retirement Ryan Smith	CSF Shrewsbury	Dukes Conference Room	RyanSmith@aigvalic.com	16-Jan-08
AIG Retirement Ryan Smith	CSF Shrewsbury	Amherst Conference Room	RyanSmith@aigvalic.com	16-Feb-08
AIG Retirement Ryan Smith	CSF Shrewsbury	Briston Conference Room	RyanSmith@aigvalic.com	12-Mar-08
AIG Retirement V. Mello	Dartmouth Campus	TBA	vsaunders@umassp.edu	13-Feb-08
AIG Retirement V. Mello	Dartmouth Campus	TBA	vsaunders@umassp.edu	12-Mar-08
AIG Retirement V. Mello	Dartmouth Campus	TBA	vsaunders@umassp.edu	23-Apr-08
AIG Retirement V. Mello	Dartmouth Campus	TBA	vsaunders@umassp.edu	21-May-08
Fidelity Ashely Taylor	Amherst Campus-Tentative	TBA	TBA	23-Jan-08
Fidelity Ashely Taylor	Amherst Campus-Tentative	TBA	TBA	7-Mar-08
Fidelity Ashely Taylor	Amherst Campus-Tentative	TBA	TBA	5-May-08
Fidelity Ashely Taylor	Amherst Campus-Tentative	TBA	TBA	29-Aug-08
Fidelity Ashely Taylor	Amherst Campus-Tentative	TBA	TBA	21-Oct-08
Fidelity Ashely Taylor	Amherst Campus-Tentative	TBA	TBA	5-Dec-08
Fidelity Ashely Taylor	CSF Shrewsbury	Nantucket Conference Room	Fidelity Reservation Sys 800-642-7131	12-Feb-08
Fidelity Ashely Taylor	CSF Shrewsbury	Nantucket Conference Room	Fidelity Reservation Sys 800-642-7132	14-Apr-08
Fidelity Ashely Taylor	CSF Shrewsbury	Nantucket Conference Room	Fidelity Reservation Sys 800-642-7133	10-Jun-08
Fidelity Ashely Taylor	CSF Shrewsbury	Nantucket Conference Room	Fidelity Reservation Sys 800-642-7134	5-Aug-08
Fidelity Ashely Taylor	CSF Shrewsbury	Hampden Conference Room	Fidelity Reservation Sys 800-642-7135	7-Oct-08
Fidelity Ashely Taylor	CSF Shrewsbury	Nantucket Conference Room	Fidelity Reservation Sys 800-642-7136	9-Dec-08
TIAA Alan Waters	Dartmouth Campus	Chartlton School of Business Room 306	Sausan Geist www.tiaa-cref.org/moc	7-Jan-08

TIAA Alan Waters	Dartmouth Campus	Chartlton School of Business Room 307	Sausan Geist www.tiaa-cref.org/moc	7-Feb-08
TIAA Alan Waters	Dartmouth Campus	Chartlton School of Business Room 308	Sausan Geist www.tiaa-cref.org/moc	5-Mar-08
TIAA Alan Waters	Dartmouth Campus	Chartlton School of Business Room 309	Sausan Geist www.tiaa-cref.org/moc	3-Apr-08
TIAA Alan Waters	Dartmouth Campus	Chartlton School of Business Room 310	Sausan Geist www.tiaa-cref.org/moc	6-May-08
TIAA/A. Waters	Dartmouth Campus	Chartlton School of Business Room 311	Sausan Geist www.tiaa-cref.org/moc	4-Jun-08
TIAA CREF M.Bertonozzi	CSF Shrewsbury	TBA	TBA	TBA

Great West-SMART PLAN Participant Meeting Schedule

Vendor	Campus	Conference Room	Session Times	Session Date
Great West-Smart Plan	CSF Shrewsbury	Essex Conference Room	1p 2p 3p 4p 5p	4-Feb-08
Great West-Smart Plan	CSF Shrewsbury	Essex Conference Room	9a 10a 11a 12p 2p 3p 4p	5-Feb-08
Great West-Smart Plan	CSF Shrewsbury	Essex Conference Room	9a 10a 11a 12p 2p 3p 4p	7-Feb-08
Great West-Smart Plan	CSF Shrewsbury	Essex Conference Room	1p 2p 3p 4p 5p	11-Feb-08
Great West-Smart Plan	CSF Shrewsbury	Essex Conference Room	9a 10a 11a 12p 2p 3p 4p	13-Feb-08
Great West-Smart Plan	CSF Shrewsbury	Essex Conference Room	9a 10a 11a 12p 1p	15-Feb-08
Great West-Smart Plan	CSF Shrewsbury	Middlesex Conference Room	1p 2p 3p 4p 5p	19-Feb-08
Great West-Smart Plan	CSF Shrewsbury	Middlesex Conference Room	9a 10a 11a 12p 2p 3p 4p	21-Feb-08
Great West-Smart Plan	CSF Shrewsbury	Middlesex Conference Room	9a 10a 11a 12p 1p	22-Feb-08
Great West-Smart Plan	CSF Shrewsbury	Middlesex Conference Room	1p 2p 3p 4p 5p	25-Feb-08
Great West-Smart Plan	CSF Shrewsbury	Middlesex Conference Room	9a 10a 11a 12p 2p 3p 4p	27-Feb-08
Great West-Smart Plan	CSF Shrewsbury	Middlesex Conference Room	9a 10a 11a 12p 1p	29-Feb-08