

How We Help

**YOUR UC-DEDICATED WORKPLACE
FINANCIAL CONSULTANTS**



Your UC-dedicated Workplace Financial Consultants



Ron Appling
UCSD, UCSD Health
Ron.Appling@fmr.com



Kim Becker
UCD, UCD Health, UCM
Kimberly.Becker@fmr.com



Jin Kim
UCI, UCLA Health
Jin.Kim@fmr.com



Andrew Fung
UCSB, UCLA
Andrew.Fung@fmr.com



Joe Hager
UCSF, UCSC
Joseph.Hager@fmr.com



Spencer Richards
UCD, UCD Health, UCM
Spencer.Richards@fmr.com



Brandon Moore
UCLA Health, UCR
Brandon.Moore@fmr.com



Nancy Pargot
UCSF, LBL, UCOP, UC Law SF
Nancy.Pargot@fmr.com



Eric Schreiber
UCB, LBL, UCOP
Eric.Schreiber@fmr.com



Adrian Rodriguez
UCSD, UCSD Health, UCR
Adrian.Rodriguez@fmr.com



Cristina Sanchez
Cristina.Sanchez@fmr.com
Se habla español



Haiau Ho Nguyen
UCB, UCSC
Haiau.HoNguyen@fmr.com



Sandy Soliman
UCLA, UCSB
Sandy.Soliman@fmr.com



Jason Walters
UCI, UCI Health
Jason.Walters@fmr.com

How we help your employees

Classes and Department Meetings



- Access to a comprehensive set of retirement planning classes suited for all UC employees.
- Held on a regular basis on-site at a central location or your department.
- Cover various financial topics.
- Class schedule posted on: myUCretirement.com/classes

One-on-One Consultations



- Talk to a UC-dedicated Workplace Financial Consultant for one-on-one assistance.
- Assistance for more complex needs such as: Financial Wellness, pre-retirement planning, and goals outside of retirement.
- Consultations are either over the phone, virtual, or in-person at your location.
- Schedule [here](#).



Educational Webinars

- A comprehensive set of retirement planning webinars you can attend from your desk.
- myUCretirement.com/classes

How we help your employees, Cont.



Help Desks

- Talk to a UC-dedicated Workplace Financial Consultant in an informal setting with no appointment necessary.
- Offered at a central location at your campus or your department.
- Employees can drop by for general questions and answers.
- Also support other events such as pre-retiree meetings or open enrollment meetings.



Online Resources and Tools

- myUCretirement.com
- UC's custom retirement portal built for your employees.
- Your source for "All things retirement."



Dedicated Spanish-fluent Workplace Financial Consultants

- Who can cover all campuses.



General Customer Support

- [1-866-682-7787](tel:1-866-682-7787)
- For general service inquiries such as enrollment or changing investments.

Let's get started

Experience a one-on-one consultation to get your retirement plan on track and see how we help others at your campus.

[Schedule Here](#)



Schedule a Webinar

For your campus or department. *Contact your Workplace Financial Consultant.*



Connect us with your Emeriti & Retiree Associations. *We have special educational content for these retiree groups.*



Promote virtual departmental meetings/webinars to your department contacts. *We have materials to help promote these events.*



Reach out to Campus resource groups (Spanish-speaking, etc.) to gauge opportunities for engagement/workshops/webinars. We have materials to help promote these events.



Not sure where to start?

Campus	WFC	Email	Phone
UC Berkeley	Eric Schreiber	eric.schreiber@fmr.com	(510) 225-8334
	Haiau Ho Nguyen	haiau.hoNguyen@fmr.com	(650) 521-3757
UC San Francisco	Joe Hager	joseph.hager@fmr.com	(801) 921-0120
	Nancy Pargot	nancy.pargot@fmr.com	(415) 310-0924
UCOP / LBNL / UC Law SF	Eric Schreiber	eric.schreiber@fmr.com	(510) 225-8334
	Nancy Pargot	nancy.pargot@fmr.com	(415) 310-0924
UC Davis / UCD Health	Spencer Richards	spencer.richards@fmr.com	(801) 519-3322
	Kimberly Becker	kimberly.becker@fmr.com	(916) 342-5106
UC Santa Cruz	Joe Hager	joseph.hager@fmr.com	(801) 921-0120
	Haiau Ho Nguyen	haiau.hoNguyen@fmr.com	(650) 521-3757
UC Merced	Spencer Richards	spencer.richards@fmr.com	(801) 519-3322
	Kimberly Becker	kimberly.becker@fmr.com	(916) 342-5106
UC Santa Barbara	Andrew Fung	andrew.fung@fmr.com	(310) 270-5606
	Sandy Soliman	sandy.soliman@fmr.com	(310) 807-1944
UCLA	Andrew Fung	andrew.fung@fmr.com	(310) 270-5606
	Sandy Soliman	sandy.soliman@fmr.com	(310) 807-1944
UCLA Health	Brandon Moore	brandon.moore@fmr.com	(626) 372-3800
	Jin Kim	jin.kim@fmr.com	(714) 844-1857
UC Riverside	Brandon Moore	brandon.moore@fmr.com	(626) 372-3800
	Adrian Rodriguez	adrian.rodriguez@fmr.com	(951) 498-4648
UC Irvine / UC Irvine Health	Jason Walters	jason.walters@fmr.com	(916) 292-1069
	Jin Kim	jin.kim@fmr.com	(714) 844-1857
UC San Diego	Ron Appling	ronald.appling@fmr.com	(805) 299-6255
	Adrian Rodriguez	adrian.rodriguez@fmr.com	(916) 498- 4648
Spanish Speaking - Cover any campus	Cristina Sanchez	cristina.sanchez@fmr.com	(323) 274- 1808

*Reach out to your dedicated campus Workplace Financial Consultant (WFC).
We'll work with you to determine your needs and next steps.*

Questions?

We have answers.

Fidelity and the Fidelity Investments logo are registered service marks of FMR LLC.
Fidelity Brokerage Services LLC, Member NYSE, SIPC, 900 Salem Street, Smithfield, RI 02917
© 2017-2026 FMR LLC. All rights reserved.
586884.15.1