



2026 Employer Event

# From Insight to Action

Takeaways and Action  
Items for Employers

Brent Sonzini, *March 24, 2026*



Trust • Commitment • Value • Innovation • Excellence

# Engage Your New Employees

## Follow the Steps



Scan now!



## I'm New to URS. Now What?

Follow these simple steps to make your Tier 2 choice at [www.urs.org/us/steps](http://www.urs.org/us/steps)



As a new Tier 2 member, you have one year from your URS enrollment date to choose either the Hybrid Option (pension) or the 401(k) Option. The Hybrid Option is the default. Follow the QR code above or go to [www.urs.org/us/steps](http://www.urs.org/us/steps) for a checklist of simple steps to get started.

Step 1

### Create a myURS Online Account

This is how you access and manage your URS benefits. Choose your beneficiaries as soon as possible.

Step 2

### Learn About Your Tier 2 Choice

Watch videos to get familiar with your Tier 2 Options. *Hybrid or 401(k)? A Quick Overview* provides a quick look. *Hybrid or 401(k)? A Detailed Discussion* offers a deeper dive.

Join a live presentation and ask questions.

Get a deeper understanding of your two retirement choices.

Step 3

### Learn About Savings Plans and Enroll

Start saving now and boost your retirement.

Invest in URS Savings Plans straight from your paycheck.

Step 4

### Schedule a One-on-One Consultation

Retirement Planning Sessions are virtual or in-person.

Still have questions? Talk to a Retirement Planning advisor.



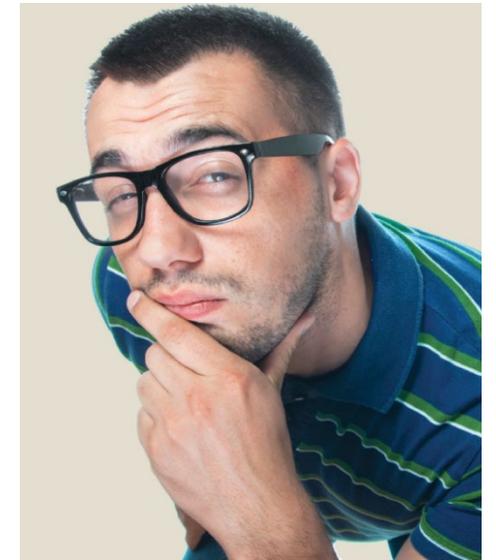
Follow these steps at [www.urs.org/us/steps](http://www.urs.org/us/steps)

# Recommended URS Onboarding Process

- » Provide Tier 2 New Hire Check List
  - › Easily guide new employees:
    - » Enrolling in and understanding their URS benefits
    - » Empower new employees to make Tier 2 choice
    - » 1 year to make irrevocable election

# Non-URS Financial Advisors

- » Be cautious of third-party advisors claiming to represent URS or have expertise in URS benefits
- » URS does not contract with or source investment advising to any third party
- » Make sure you're acting in your best interests
  - › Talk to URS before making any decisions including:
    - » Retirement benefits
    - » Moving money out of URS Savings Plans



# Protecting Your Employees

## » Consider policies to limit solicitations

Washington School District Policy 3600 - Distribution and Posting of Promotional Materials

PROCEDURE v2020.12.14 | Developed for **Washington County School District** | © 2022 WCSD |

### 3.3. Sales Representatives and Agents

- Because sales activities have the potential to disrupt the educational program, representatives, agents, and other individuals, are prohibited from promoting or selling individual products such as tax-sheltered annuities, insurance programs, investment opportunities, life insurance programs, accident insurance, etc, in classrooms, schools, break rooms, or at work site locations during school or business hours (to include 30 minutes before and 30 minutes after school time). This limitation includes the use of lunch breaks and prep time. Sales agents and representatives promoting products specific to the operation of the school or District are not subject to this limitation and may visit with administration or authorized personnel during work hours.
- Except as approved for by the Washington County School District Superintendent for group benefits, sales representatives and agents must not be given time in faculty meetings or other group meetings.
- With the exception of authorized group insurance benefits, sales agents are not to be provided with lists of employee names, addresses or phone numbers.

**URS**  
Utah Retirement Systems

# Look Before You Leap!

**Talk to URS first**  
before making any decisions about your retirement benefits or moving money from URS Savings Plans.

**Be cautious of any outside advisor who claims to represent URS or have expertise in URS benefits.**

**If You Need Advice, Schedule a Retirement Planning Session: [www.urs.org/us/irps](http://www.urs.org/us/irps)**

**Understand Fees Before You Make Any Moves**  
This simple guide will help you understand investment fees and know important questions to ask.

**URS IS A NONPROFIT TRUST; OUR ADVISORS NEVER EARN COMMISSIONS.**

# Retirement Planning Advisors



- » On-site presentations, training
- » Benefit fairs
- » Ongoing webinars
- » Seminars
- » Individual retirement planning sessions
- » Individual financial wellness sessions

# Retirement Planning Advisors



- » Individual Retirement Planning Sessions
  - › Pension, Retirement Savings Plans, Social Security
  
- » Financial Wellness Session
  - › Debt management, Emergency Savings, Budgeting

# Three Types of Seminars



- » Early to Mid-Career
- » Pre-Retirement
  - › Within 10 years of retirement
- » Retiree

A flyer for the 2026 Seminars. The flyer is titled "2026 Seminars" and lists three types of seminars: Early to Mid-Career, Pre-Retirement, and Retiree. It includes dates, times, and locations for each. The flyer also features a QR code and the slogan "Illuminate Your Path to a Secure Tomorrow".

**2026**

**Early to Mid-Career Seminars**

In-Person	Virtual
8:30 a.m. - 1 p.m. Salt Lake City ..... July 31	9 - 11:30 a.m. September 25

**Pre-Retirement Seminars**

In-Person	Virtual
9 a.m. - 4 p.m. St. George ..... May 28 Ogden ..... June 5 South Salt Lake ..... June 12 Logan ..... June 18 Farmington ..... June 26 West Jordan ..... July 10 Spanish Fork ..... July 17	Cottonwood Heights ..... September 18 Murray ..... October 2 8:30 a.m. - 12:30 p.m. April 24 October 30

**Retiree Seminars**

In-Person	Virtual
8:30 a.m. - 4 p.m. Salt Lake County ..... May 15	8:30 - 11:30 a.m. November 13

**Cottonwood Heights**  
City Hall  
2277 Bengal Blvd.

**Farmington**  
Davis County Admin Bldg  
61 South Main St.

**Logan**  
Cache County  
School District Office  
84 East 2400 North

**Murray**  
Murray City Hall  
10 East 4500 South

**Ogden**  
Ben Lomand High School  
1080 9th St.

**Salt Lake City**  
Utah Retirement Systems  
500 East 200 South

**Salt Lake County**  
Government Center  
2001 South State St.

**South Salt Lake**  
Granite Education Center  
2500 South State St.

**Spanish Fork**  
Nebro School District Office  
350 South Main St.

**St. George**  
Washington School District  
121 West Tabernacle

**West Jordan**  
Jordan School District  
Auxiliary Services Building  
7905 South Redwood Bl.

Learn More and Register ▶

Illuminate Your Path to a Secure Tomorrow

# Three Types of Seminars

## Two different formats



### » In-Person

- › St. George
- › Ogden
- › South Salt Lake
- › Logan
- › Farmington
- › West Jordan
- › Spanish Fork
- › Cottonwood Heights
- › Murray
- › Salt Lake City

# AUREUS

- » Launching Monday!
- » Thanks for your partnership
- » A period of change and patience

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What to Expect From the New Employer Portal » Page 3

Spring 2026  
**InsideStory**  
Newsletter for URS Participating Employers

**5** AUREUS Go-Live » March 30, 2026  
**Things You Should Know Before AUREUS Launches**

**1** ▶ **The March 30 Finish Line Isn't the End**  
The best of what AUREUS has to offer will emerge over time as we **continue building on the foundation** we set on March 30. **FINISH START**

**2** ▶ **We're Prepared and Confident**  
We expect challenges ahead as we face one of the most complex transitions in URS history. But we're **confident in the foundation** and stability of AUREUS.

**3** ▶ **Web Administrators Have Important March 30 Tasks**  
Web Administrators will be notified by URS on March 30 to register for the AUREUS Employer Portal. Once registered, the Web Administrators will need to register other Organization Contacts. **See More Details, Page 4**

**4** ▶ **Temporary Delays May Be Possible**  
**Thank you for your patience** if employer and member call wait times are higher than usual. Expect possible delays in any assistance you may need with files.

**5** ▶ **Prepare Your Payroll to Submit After Blackout**  
While we're currently in the employer blackout period, take this opportunity to ensure that your files are accurate, complete, and in the correct format to submit to AUREUS on March 30. Check out **these resources** to help you understand and meet the specifications.

# Roth 401(k) and 457(b)

## » Webinar for **Employers**

- › The Roth Advantage: Empowering Employees With Tax-Free Retirement
- › Three held in January
- › Recording <https://player.vimeo.com/video/1152943274>
- › Employer Portal, Knowledge Corner, Savings Plans category

# Roth 401(k) and 457(b)

## » Webinars for **Employees**

- » The Roth Advantage: Empowering You With Tax-Free Retirement
  - › Wednesday, April 29<sup>th</sup> 9 – 10:30 a.m.
  - › Monday, May 18<sup>th</sup> 3 – 4:30 a.m.
- » Register at [www.urs.org/general/webinars](http://www.urs.org/general/webinars)
- » Will be recorded and available on [www.urs.org](http://www.urs.org)

# Comprehensive Employer Training



- » What is covered?
  - › Title 49 compliance
  - › Legislative updates and board resolutions
  - › Administrative hot topics
  - › AUREUS updates
- » Who should attend?
  - › All staff members who participate in administering the retirement benefits

# Comprehensive Employer Training



- » St. George – Tuesday, Sept. 15
- » Richfield – Wednesday, Sept. 16
- » Price – Thursday, Sept. 17
- » Ogden – Monday, Sept. 21
- » Logan – Tuesday, Sept. 22
- » Sandy – Wednesday, Sept. 23
- » Orem – Thursday, Sept. 24
- » Vernal – Tuesday, Sept. 29
- » Salt Lake – Wednesday, Sept. 30
- » Virtual – Thursday, Oct. 1

# Videos and Slides from Today's Event

» [www.urs.org/event](http://www.urs.org/event)

» Slides are available now; videos will be posted later this week

» Look for an emailed survey this week



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**Trust • Commitment**  
**Value • Innovation • Excellence**