

**UIC Retirement Planning Conference**  
**May 30, 2009**  
**Student Center West, Chicago Rooms A & B**

- 8:00am – 8:45am**      ***Retiree Panel Discussion***  
Recent UIC Retirees share what they wish they had known, what worked and what didn't work about preparing for their retirement.
- 8:55am – 10:40am**      ***Preparing for Retirement***  
Lee Bridges, Retirement Counselor, State Universities Retirement System (SURS)  
This seminar covers a variety of topics including, but not limited to, retirement calculations, service credits (qualifying to purchase additional service), service for sick leave, salary averages, qualifying for insurance, and return to employment.
- 10:50am – 11:50am**      ***Staying on Track in a Volatile Market***  
Jolene Benson, Consultant, TIAA-CREF  
In times like these, keeping a close eye on investment strategy is more important than ever. Employees can gain more perspective on how TIAA-CREF can manage the current volatility. This seminar:
- Discusses market volatility in general,
  - Gives examples of notable market downturns in the past, and
  - Identifies options to help manage accounts in the midst of changes in market conditions.
- 12:00pm – 12:30pm**      ***What You Can Do to Protect Your Retirement Benefits***  
Judy Curry, Board Member and Past President, State Universities Annuitants' Association Chicago Chapter
- 8:00am – 4:30pm**      **Vendor Booths, 2<sup>nd</sup> Floor Lobby**  
Fidelity Investments  
John McCrosky  
State Universities Annuitants' Association Chicago Chapter (SUAA)  
State Universities Retirement System (SURS)  
TIAA-CREF  
UIC Benefits Service Center
- 1:40pm – 2:40pm**      ***Finding the Right Investment Strategy***  
Lou Gadoury, Senior Relationship Manager, Fidelity Investments  
The goal of this workshop is to educate enrolled participants on how to determine an appropriate asset allocation as defined by their Investor Profile Questionnaire (IPQ), how to apply that well-diversified strategy to their workplace savings plan, and techniques for rebalancing their account.
- 2:50pm – 3:20pm**      ***Medicare and Social Security: Implications Related to Your SURS Pension***  
John McCrosky  
Do UIC retirees qualify for Social Security benefits?  
How does SURS income offset Social Security income?
- 3:30pm – 4:30pm**      ***Understanding the Basics of UIC Retirement Plans***  
John McCrosky  
A discussion on the various aspects of the three retirement plans available to UIC employees: SURS, 403(b), and 457(b). What are some of the critical steps you need to take for planning a financially successful retirement?