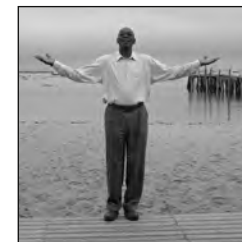


2006

Saturday, April 1, 2006
Chicago Rooms
UIC Student Center West
828 South Wolcott Avenue

Twentieth

**Annual UIC
Retirement
Planning
Conference**



Cosponsored by UIC Human Resources and the UIC Chapter of SUAA.



FINANCIAL SERVICES
FOR THE GREATER GOOD™



UIC UNIVERSITY OF ILLINOIS
AT CHICAGO

The purpose of the State Universities Annuitants Association (SUAA) is to promote the individual and collective interests and welfare of its members who are active faculty and staff and retirees of state universities and community colleges.

SUAA's objectives are to support favorable legislation and to inform members about legislation important to retirees; to publicize information about overall senior citizens concerns; and to work for adequate funding for annuitants and survivors in the Illinois State Universities Retirement System (SURS).

If you are currently a beneficiary of SURS, or expect to be in the future, you are eligible to join the UIC Chapter of the State Universities Annuitants Association. Members receive newsletters throughout the year with important information relevant to their interests. Dues (payable annually or by deduction from your monthly SURS benefit payment) are \$30.00 per year and may be paid at the conference or you may fill out and mail an application from the SUAA-UIC Web site at www.uic.edu/orgs/suaa/. You will also find useful links and information on this Web site.

UIC Chapter, *Founded 1971* (MC 270)
State Universities Annuitants Association (SUAA)
1140 South Morgan Street, Room 146F
Chicago, Illinois 60607
Phone (312) 996-5834

Office of Special Programs (MC 264)
University of Illinois at Chicago
715 South Wood Street
Chicago, Illinois 60612-7220

UIC UNIVERSITY OF ILLINOIS
AT CHICAGO
Office of Special Programs (MC 264)
715 South Wood Street
Chicago, Illinois 60612-7220

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Retirement Planning Conference

Purpose and Audience

The purpose of the Retirement Planning Conference is to assist UIC faculty, staff, and families in planning for retirement by providing information and access to resources. Retirement planning can never start too soon.

Whether you are planning on retiring in two years or fifteen years, you should attend this conference.

Registration

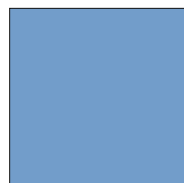
Thanks to the support provided by the sponsors and other contributing units and agencies, the registration fee per person for participation in the conference is only \$10. (The registration fee is waived for current retirees who are members of SUAA—the State Universities Annuitant's Association.) To ensure that there will be adequate space and resource materials for all participants, advance registration is required. To register, please complete the attached form. For further information, contact Jacqueline Berger at (312) 413-0075 or jacquieb@uic.edu.

Parking

Parking is available in the Wood Street Parking Structure located between Taylor Street and Roosevelt Road on Wood Street. Valid parking assignments will be honored on exit. If you do not have a valid parking assignment, there will be a charge for parking.

Refreshments/Lunch

A continental breakfast will be served during the morning. Box lunches may be purchased (see registration form). Sandwich choices are turkey, roast beef/ham, tuna salad, or vegetarian. Box lunches also include cookie, chips, and soda. If you prefer, you may bring your own lunch.



Annual SUAA/UIC Retirement Planning Conference

Schedule

8:00–8:30

Registration

8:30–8:40

Opening Remarks

8:40–8:45

What You Can Do to Protect Your Retirement Benefits

Irving Miller, President, State Universities Annuitants' Association Chicago Chapter

8:45–9:15

Social Security and Medicare News for SURS Members

Do UIC retirees qualify for Social Security benefits?
How does SURS income offset Social Security income?

John McCrosky, SURS Annuitant, formerly with UIC, SURS, and TIAA-CREF with many years of retirement planning experience.

9:15–10:15

Overview of UIC's Retirement Plan/SURS

Proposed changes in your retirement program; how to get information on procedures for retiring; keeping up with current information.

Lee Bridges and Marlys Johnson, Retirement Specialists, SURS

10:20–11:20

Estate Planning, Wills, and Trusts

A well-known Chicago attorney discusses how to save on taxes and avoid probate, the importance of the health-care power of attorney, and the pros and cons of wills and trusts.

Laurence Kline, JD, Partner, Hoogendoorn and Talbot

OR

Issues in Long-Term Care

The session will provide information on the current status of care for individuals as they age. This will focus on the entire range of services, from nursing homes to home- and community-based services. We will discuss facts (and have fact sheets) regarding things like long-term care insurance, helping caregivers, nursing homes and assisted living facilities, and questions to ask when evaluating the situation and communicating with medical professionals. While most of us normally do not think of our future long-term care needs until it becomes a necessity or until we have to help a loved one, getting a better understanding of the system can assist in planning and making decisions now for a better future.

Ralph Yaniz, State Director, AARP Illinois

11:25–12:25

Your Retirement Income Options

Developing a sound financial strategy for retirement can make a big difference. Now is the time to get answers to some important questions and begin planning. Topics will include:

- Sources of retirement income
- Evaluating your retirement income needs
- Techniques to keep your retirement strategy on target
- Income options available from TIAA-CREF
- Taxation and avoiding penalties

Richard Leach, Individual Consultant, TIAA-CREF Individual Client Services

OR

Enrolling in Your Workplace Savings Plan

The goal of this workshop is to show employees how to start saving for retirement through use of the workplace savings plan. Key topics include how much you may need at retirement, how to create a budget, advantages to a workplace savings plan, and investment options.

Sharon Byrd, Retirement Counselor, Fidelity

OR

Marriage and Retirement: Finding the Gold in the Golden Years

"Age is opportunity no less than youth itself, though in another dress and as the evening twilight fades away the sky is filled with stars invisible by day."—Longfellow

While Longfellow was an optimist about the golden years, many married retirees experience the downside of retirement: poor health, too much togetherness, more disagreements, and financial concerns. This workshop will identify both the gains and losses of marriage during the retirement years with special focus on maximizing the positives.

Dr. Geraldine Piorkowski, Clinical Associate Professor of Psychology and Former Director of the UIC Counseling Center

12:30–1:30

Working Lunch

Use this time to continue discussions with our retirement experts. We will have tables set up with representatives from many of our 403b vendors, as well as representatives from organizations like AARP, Long-Term Care vendors, and others.

1:30–3:30

The Nuts and Bolts of SURS

A special session designed for those employees who will be retiring in the next few years and want an overview of the step-by-step process for retiring. There will be ample opportunity to ask questions in this session.

Lee Bridges and Marlys Johnson, Retirement Specialists, SURS

OR

Financial Planning

A discussion on the various aspects of the three retirement plans available to UIC employees—SURS, 403b's and 457b's. What are some of the critical steps I need to take for planning a financially successful retirement?

John McCrosky, SURS Annuitant, formerly with UIC, SURS, and TIAA-CREF with many years of retirement planning experience.

Saturday, April 1, 2006



Register Early

Registration deadline: March 24, 2006

SUAA/UIC Retirement Planning Conference

Saturday, April 1, 2006

Chicago Rooms, UIC Student Center West

Name _____

Phone _____

E-mail _____

If you have a spouse/partner/guest who would like to attend, please fill out a separate registration form for them. Registration fees may be paid with one check.

Please check one:

- UIC Employee
 UIC Annuitant
 SUAA Member (\$10 registration fee waived)
 Guest

Please register for the break-out sessions:

Concurrent Session I 10:20–11:20 (Choose one)

___ Estate Planning, Wills, and Trusts

___ Issues in Long-Term Care

Concurrent Session II 11:25–12:25 (Choose one)

___ Your Retirement Income Options

___ Enrolling in Your Workplace Savings Plan

___ Marriage and Retirement

Concurrent Session III 1:30–3:30 (Choose one)

___ Nuts and Bolts of SURS

___ Financial Planning

Deli box lunch choices (\$11.00 each)

___ Tuna Salad on Multigrain Roll

___ Turkey, Bacon, and Cheese on Sourdough

___ Roast Beef, Ham, and Cheddar on French Roll

___ Stuffed Greek Salad Pita

Registration fee enclosed: \$ _____

(\$10/person)

Box lunch fee enclosed: \$ _____

(\$11/lunch)

Total enclosed: \$ _____

Make check payable to:

Retirement Planning Conference

Mail to: Office of Special Programs (MC 264)

Attn: Jacqueline Berger

University of Illinois at Chicago

715 South Wood Street, Room 224-D

Chicago, Illinois 60612

Questions:

Please contact Jacqueline Berger at
(312) 413-0075 or jacquieb@uic.edu.

Additional registration forms are available at
www.uic.edu/depts/hr/Special_Programs/departments.html

