

The purpose of the State Universities Annuity Association (SUAA) is to promote the individual and collective interests and welfare of its members, retirees of state universities and community colleges.

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

All full-time employees of UIC are eligible to join the State Universities Annuity Association Chapter at the University of Illinois at Chicago. Members receive e-mail alerts with information on legislation and other important retirement concerns. Visit our Web site for detailed information about chapter activities. Applications will be available at the conference and are available at our Web site: www.uic.edu/orgs/suaa. Dues are \$30 per year.

State Universities Annuity Association (SUAA)
UIC Chapter – Founded 1971

UIC University of Illinois
at Chicago

Office of Special Programs (MC 891)
715 South Wood Street
Chicago, Illinois 60612-7220

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2004

Saturday, April 17, 2004
Illinois Room
Chicago Circle Center
750 South Halsted Street

Eighteenth

**Annual UIC
Retirement
Planning
Conference**

cosponsored by

The UIC Chapter of the State University Annuity Association,
the University of Illinois at Chicago,

and



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**Annual UIC
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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 \$10.00. (The registration fee is waived for current retirees who are members of SUAA – the State Universities Annuity Association.) To ensure that there will be adequate space and resource materials for all participants, advanced 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 at the Halsted Street Parking Structure located between Polk and Taylor on Halsted, directly across from Chicago Circle Center. Valid parking assignments will be honored on exit. If you do not have a valid parking assignment, there will be a charge for parking. SUAA will have discounted parking validation stickers for sale at the conference. These can be used on exit from the parking lot. The stickers will be \$3 (normal weekend parking rate is \$4.50). Cash only.

Refreshments/Lunch

A continental breakfast will be served during the morning and coffee and tea will be available throughout the day. Box lunches may be purchased (see registration form). Sandwich choices are ham, turkey, roast beef, or vegetable. Box lunches also include fruit, chips, and soda. If you prefer, you may bring your own lunch.

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**
Frank Tachau, PhD, President, State Universities Annuity Association UIC 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, Individual Consultant, TIAA-CREF
- 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**
- Private Long-Term Care Insurance**
The purchase of long-term care insurance is an important and often expensive decision. An expert discusses a new policy designed exclusively for SURS members.
Elsie Eisenmann, LTC Specialist, Long-Term Care Solutions
- 11:25–12:25 403b Plan Minimum Distribution—What You Should Know Before You Retire**
How minimum distribution rules work in retirement plans.
John McCrosky, Individual Consultant, TIAA-CREF
- OR**
- Women's Forum: Debunking Financial Myths**
Find out why women's retirement plans should be different from men's, seven reasons why women should save more, and the impact of career interruptions on investment planning.
Lynn Hammell, Individual Consultant, TIAA-CREF
- 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 National Able Network and Elderhostel.
- 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**
- Informed Investing**
Have you ever wondered what your financial advisor *really* means when she says an investment is low risk, your portfolio is diversified, she uses asset allocation, or that your mutual fund is a load/no-load/rear-load fund and has 12(b)1 charges? Maybe you'd like, for once, to clearly understand stocks, bonds, mutual funds, munis, dividends, and capital gains. This session will help you gain a true understanding of key investment concepts and strategies
Karen Chan, CFP, University of Illinois Extension

Register early

Registration deadline: April 7, 2004

**SUAA/UIC Retirement Planning Conference
Saturday, April 17, 2004
Illinois Room, Chicago Circle Center**

Name: _____

Phone: _____

E-mail: _____

Spouse/Family member's name (if attending): _____

Please check one:

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

Please register for the break-out sessions:

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

___ Estate Planning, Wills, and Trusts

___ Long-Term Care Insurance

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

___ Women's Forum

___ 403b Plan Minimum Distribution

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

___ Nuts and Bolts of SURS

___ Informed Investing

Deli box lunch choices (\$10.00 each)

___ Ham and Swiss on a Kaiser Roll

___ Turkey and Monterey Jack on a Wheat Roll

___ Roast Beef and Cheddar on a Kaiser Roll

___ Grilled Vegetables on Roll

Registration fee enclosed: \$ _____

(\$10/person)

Box lunch fee enclosed: \$ _____

(\$10/lunch)

Total enclosed: \$ _____

Make check payable to:

Retirement Planning Conference

Mail to: Jacqueline Berger
Office of Special Programs (MC 264)
University of Illinois at Chicago
715 South Wood Street, Room 224B
Chicago, Illinois 60612

Questions:

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

