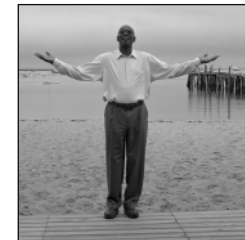


# 2007

Saturday, April 21, 2007  
Chicago Rooms  
UIC Student Center West  
828 South Wolcott Avenue

## Twenty-First

**Annual UIC  
Retirement  
Planning  
Conference**



Cosponsored by UIC Human Resources and UIC United (UIC Chapter of SUAA).



**FINANCIAL SERVICES  
FOR THE GREATER GOOD™**



**UIC UNITED**

**UIC** UNIVERSITY OF ILLINOIS  
AT CHICAGO

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

SUAA's objectives are to support favorable legislation and to inform members about important legislation for 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 Annuity Association. Members receive newsletters with important information relevant to their interests throughout the year. Dues are \$30.00 per year, payable annually or by monthly deduction from your SURS benefit payment. They 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/](http://www.uic.edu/orgs/suaa/). You will also find useful links and information on this Web site.

UIC United, Founded 1971 (MC 270)  
State Universities Annuity 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

Nonprofit Org.  
U.S. Postage  
**PAID**  
Chicago, Illinois  
Permit No. 4860

# Twenty-First

**Annual UIC  
Retirement  
Planning  
Conference**

Saturday, April 21, 2007  
Chicago Rooms  
UIC Student Center West  
828 South Wolcott Avenue

# 2007

# 2007

## 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 \$10.00. (The registration fee is waived for current retirees who are members of SUAA, the State Universities Annuitants' 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.

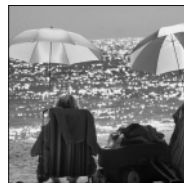
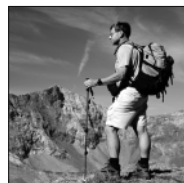
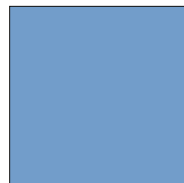
### Parking

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 vegetable. Box lunches also include fruit, chips, and soda. If you prefer, you may bring your own lunch.



# Twenty-First

## Annual SUAA/UIC Retirement Planning Conference

### Schedule

- 8:00-8:30 a.m. Registration**
- 8:30-8:40 a.m. Opening Remarks**
- 8:40-8:45 a.m. What You Can Do to Protect Your Retirement Benefits**  
Irving Miller, President, State Universities Annuitants' Association Chicago Chapter
- 8:45-9:15 a.m. Social Security and Medicare News for SURS Members**  
Do UIC retirees qualify for Social Security benefits?  
How does SURS income offset Social Security income?  
Larry Keillor, Social Security Administration
- 9:15-10:15 a.m. 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 Michael Sheppard, Retirement Specialists, SURS
- 10:20-11:20 a.m. Estate Planning, Wills, and Trusts**  
A well-known Chicago attorney discusses how to save on taxes and avoid probate, the importance of the healthcare power of attorney, and the pros and cons of wills and trusts, and the importance of the property and healthcare powers of attorney.  
Laurence Kline, JD, Partner, Hoogendoorn and Talbot
- Or**
- Do You Have a Long Term Care Crack in Your Nest Egg?**  
The biggest mistake investors are making with their retirement money is failing to consider long term care needs. How can you achieve dignity for life? Learn the issues and answers to long term care.  
Kathy Noerenberg, Partner, LTC Financial Partners
- 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 time together, more disagreements, and new 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 Piorowski, Clinical Associate Professor of Psychology and Former Director of the UIC Counseling Center
- 11:25 a.m.-12:25 p.m. Your 403(b) Retirement Income Options**  
This seminar helps employees identify which option best suits their needs, based upon their vision of retirement.  
Patrick Windle, Consultant, TIAA-CREF Individual Services
- Or**
- Taking Advantage of Your Workplace Savings Plan/403b**  
This workshop provides information on the importance of enrolling and starting as early as possible, the benefits of a workplace savings plan, establishing a budget and plan for saving, and motivating employees to enroll or increase their savings.  
Tim Davis, Regional Consultant, Fidelity Investments
- Or**
- SUAA and SUACTION: Protecting Illinois Retirement and Health Benefits**  
How secure is the funding of the Illinois Pension Systems? What can be done to protect your retirement, health, and other benefits? Learn about the State Universities Annuitants' Association (SUAA), its political involvement committee (SUACTION), and how you can be an active participant in efforts to secure your own future well-being.  
Richard Johnson, Professor of Political Science Emeritus; Chair, UIC SUACTION Committee
- 12:30-1:30 p.m. 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 Social Security, Elderhostel, and others.
- 1:30-3:30 p.m. 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 Michael Sheppard, Retirement Specialists, SURS
- Or**
- Building Your Financial Future** (Please note that this session will end at 2:30 p.m.)  
Are you ready to get on the right path toward overall financial health and begin planning for future investment goals? This seminar will help you develop a disciplined approach to achieving control and working toward your lifetime goals. It will give you an understanding of how tax-advantaged investments, such as IRAs and 529 plans, can help you maximize your savings and will give you an investment strategy to help you construct a portfolio that's in line with your goals.  
Tony Perrin, Regional Consultant, Fidelity Investments



Saturday, April 21, 2007

## Register Early

Registration deadline is April 13, 2007  
SUAA/UIC Retirement Planning Conference  
Saturday, April 21, 2007  
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 a.m. (Choose one)

- \_\_\_ Estate Planning, Wills, and Trusts
- \_\_\_ Do You Have a Long Term Care Crack in Your Nest Egg?
- \_\_\_ Marriage and Retirement

#### Concurrent Session II 11:25 a.m.-12:25 p.m. (Choose one)

- \_\_\_ Taking Advantage of Your Workplace Savings Plan
- \_\_\_ Your Retirement Income Options
- \_\_\_ SUAA and SUACTION

#### Concurrent Session III 1:30-3:30 p.m. (Choose one)

- \_\_\_ Nuts and Bolts of SURS
- \_\_\_ Building Your Financial Future

### Deli box lunch choices (\$13.00 each)

- \_\_\_ Tuna Salad on Whole Wheat
- \_\_\_ Turkey, Bacon, and Cheese on Sourdough
- \_\_\_ Ham and Cheddar on Ciabatta
- \_\_\_ Portobello Mushroom and Spinach on Ciabatta

Registration fee enclosed: \$ \_\_\_\_\_  
(\$10/person)

Box lunch fee enclosed: \$ \_\_\_\_\_  
(\$13/lunch)

Total enclosed: \$ \_\_\_\_\_

Make check payable to:  
Retirement Planning Conference

Mail to: Attn: 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 at  
(312) 413-0075 or jacquieb@uic.edu.

Additional registration forms are available at  
www.uic.edu/depts/hr/Special\_Programs/departments.html

