

2008

Saturday, March 29, 2008
Chicago Rooms
UIC Student Center West
828 South Wolcott Avenue

Twenty-Second

**Annual UIC
Retirement
Planning
Conference**



Cosponsored by UIC Human Resources, UIC United (UIC Chapter of SUAA), TIAA-CREF, and Fidelity Investments



UIC UNITED

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 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 Annuitants' 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/. You will also find useful links and information on this Web site.

UIC United, 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
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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 three years or thirty years, you should attend this conference.

Registration

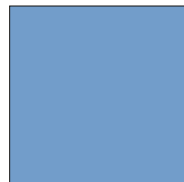
Thanks to the support provided by the sponsors and other contributing units and agencies, the registration fee per person for participation in the conference is only \$10.00, which includes admission, along with a continental breakfast. (Admission for current retirees who are members of SUAA—the State Universities Annuitant's Association is waived). Box Lunches are available for an additional \$13.00. 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 Stacey Thomas at (312) 355-0325 or slthomas@uic.edu.

Parking

Parking is available in the Wood Street Parking Structure located between Taylor and Roosevelt on Wood Street. Current 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. Optional box lunches (sandwich, chips, cookie, and soda) will be served during the lunch hour. Please make sure to select your choice of lunch on your registration form. Available choices are: turkey with bacon, American cheese, lettuce, and tomato on sourdough; roast beef with tarragon cream, lettuce, and tomato on sourdough; tuna salad with ranch dressing, cucumbers, and alfalfa sprouts on whole wheat bread; and grilled portobello mushrooms with baby spinach and sun-dried tomato pesto on a ciabatta roll. You may also bring your own lunch or purchase a lunch from the cafeteria.



Twenty-Second

Annual SUAA/UIC Retirement Planning Conference

Schedule

- 8:00–8:30 a.m. Registration**
- 8:30–8:35 a.m. Opening Remarks**
- 8:35–8:45 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. Medicare and Social Security: Implications Related to Your SURS Pension**
Do UIC retirees qualify for Social Security benefits?
How does SURS income offset Social Security income?
John McCrosky, Second Vice President, UIC United
- 9:15–10:15 a.m. SURS Update**
Proposed changes in your retirement program; how to get information on procedures for retiring; keeping up with current information.
Mike Sheppard, CRC; Assistant Deputy Director of SMP
- 10:20–11:20 a.m. TIAA-CREF: Your Retirement Income Options**
What's Your Vision of Retirement? Enjoying a comfortable and potentially rewarding retirement will depend upon having enough income to live on in addition to good health and relationships with family and friends. A sound retirement strategy can make a difference. In this session, you will learn:
 - To identify potential hazards in planning for an comfortable retirement
 - To help identify savings gaps that can prevent you from reaching retirement goals
 - To demonstrate how important it is to choose income options based upon individual needs
 - How TIAA-CREF financial solutions and help you to and through retirement
 Jolene M. Benson, TIAA-CREF Individual Client Services Consultant
- Or**
- Fidelity Investments: Achieving a Sound Retirement**
Fidelity representatives will present options UIC employees have to learn how to maximize your savings before and during retirement.
Jim Stair, Fidelity Investments—Retirement Counselor
- 11:25 a.m.–12:25 p.m. 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 & Talbot
- Or**
- Long-Term Care Issues and Insurance**
This session will describe situations where long-term care may be needed, as well as how to choose ample coverage and how to pay for long-term care insurance.
Jim Fuentes, State Farm Insurance
- 12:30–1:30 p.m. Working Lunch**
Use this time to grab a bite to eat and continue discussions with our retirement experts. We have tables set-up with representatives from our sponsor organizations (SUAA, TIAA-CREF, and Fidelity) as well many other resources for all your retirement needs.
- 1:30–3:30 p.m. The Nuts and Bolts of SURS (General Session)—NOTE: This is a 2 HOUR session**
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.
Marlys Johnson, CRC; Benefits Counselor
- Or**
- 1:30–2:30 p.m. Understanding the Basics of UIC Retirement Plans—NOTE: This is a 1 HOUR session**
A discussion on the various aspects of the three retirement plans available to UIC employees, SURS, 403(b)s, and 457(b)s. What are some of the critical steps you need to take for planning a financially successful retirement.
John McCrosky, Second Vice President, UIC United
- And**
- 2:30–3:30 p.m. AARP: Miscellaneous Retirement Issues—NOTE: This is a 1 HOUR session**
This session will cover current retirement issues, including a discussion regarding AARP's financial/retirement security work and their "Divided We Fail" campaign.
Presented by a local AARP Representative



Saturday, March 29, 2008

Register Early

Registration deadline: March 17, 2008
(Please mail no later than Wednesday, March 12.)

SUAA/UIC Retirement Planning Conference
Saturday, March 29, 2008
Chicago Rooms, 2nd floor, 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 w/lunch (\$23) w/o lunch (\$10)
- UIC annuitant w/lunch (\$23) w/o lunch (\$10)
- SUAA member w/lunch (\$13)* w/o lunch (n/c)*
- *(\$10 registration fee waived for current SUAA members only)
- Guest with lunch (\$23) w/o lunch (\$10)

Deli box-lunch choices

- Turkey, bacon, and cheese on sourdough
- Roast beef with tarragon on sourdough
- Tuna salad on whole wheat
- Grilled portobello mushroom and spinach on ciabatta

Please register for the breakout sessions:

- Breakout Session I 10:20–11:20 a.m. (Choose one)**
 - TIAA-CREF: Your Retirement Income Options
 - Fidelity Investments: Achieving a Sound Retirement
- Breakout Session II 11:25 a.m.–12:25 p.m. (Choose one)**
 - Estate Planning, Wills, and Trusts
 - Long-Term Care Issues and Insurance
- Breakout Session III 1:30–3:30 p.m. (Choose one)**
 - Nuts and Bolts of SURS (2 hrs)
 - UIC Retirement Basics (1 hr) and AARP Presentation (1 hr)

Registration fee enclosed: \$ _____
\$10.00/person (except current SUAA members)

Box lunch fee enclosed: \$ _____
\$13.00/person

Total enclosed: \$ _____

Make check payable to: Retirement Planning Conference

Mail to: Stacey Thomas
UIC Special Programs (MC 264)
715 South Wood Street
Chicago, Illinois 60612

Questions: Please contact Stacey Thomas at
(312) 355-0325 or slthomas@uic.edu.



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