



Retirement Association

UNIVERSITY OF WISCONSIN-MADISON

Committee on Financial Matters in Retirement (CFMR)

The Committee on Financial Matters in Retirement (CFMR) offers a variety of programs and opportunities to help UWRA members better understand financial, economic, investment issues, and state and federal benefits in retirement. These programs and opportunities include webinars, online discussions, and in person talks. The committee seeks to understand the needs and interests of our membership and then respond to those interests with experts that we can draw from the university, the State of Wisconsin, or our broader contacts. Specific past topics include, but are not limited to U.S. Economy Forecasts, Market Updates, Trusts and Wills, State of Wisconsin ETF Health and Pension Benefits, Identity Theft, Federal Social Security and Medicare Updates, Retirement Living Facilities, Insurance, and Investing.

Through annual polling of CFMR program attendees, the Committee identifies additional topics of interest and finds speakers. Topics covered in past years include investments, asset protection, and retirement savings.

CFMR is not restricted to bringing speakers in for seminars. Over the past years, specific topics of interest have led to the creation of sub-committees to research, codify and present information through CFMR seminars. Two such instances, which speaks to the dedication of individual CFMR members, have been very well received by the UWRA membership:

1. A study of Senior Living and Care Communities (SLCCs). The subcommittee studied the most comprehensive SLCCs in the greater Madison area. The selected SLCCs were asked to provide answers to questions on: the types and number of housing units available, levels of service, fees by level service and accommodation, ratios of professional and non-professional staff to residents, etc. The results of the sub-committee research were presented in seminars over two successive years and a document of the results tabulated in a spreadsheet format that provided one discrete method of comparing the various SLCCs.
2. Update to *Living Ledger*. The *Living Ledger* of 2019 is an electronic tool for identifying and locating personal documents that heirs, executors, and agents with power-of-attorney may need when handling financial resources, real or virtual property, and end-of-life issues. This version is an update to the *Living Ledger* of 2007, also undertaken by CFMR members.

We look forward to seeing you at our programs.

The committee is open to new members at any point during the year. We seek fellow retirees with a broad range of financial, economic, and investing interests and a willingness to help organize a program or two along with the rest of the team. For additional information about the UWRA Financial Matters in Retirement Committee, please contact any other committee member or UWRA Executive Director.