Committee on Financial Matters in Retirement
Millard Susman and Kath Irwin, Co-Chairs

The committee has offered the following nine seminars over the current academic year:

September 16, 2014. Charitable contribution opportunities: Strategies for planning your charitable gift-giving by Scott McKinney, Vice President at the University of Wisconsin Foundation, and Bob Sorge, President, and Ann Casey, Vice President of Finance and Planned Giving, of the Madison Community Foundation. (Attendance: 43)

October 21, 2014. Health Insurance for Retirees by Bill Kox, Deputy Administrator for the Division of Insurance Services with the Department of Employee Trust Funds (ETF). (Attendance: 109)

November 19, 2014. IRAs, Roths, and 403(b)s. Oh My! Tax issues affecting the health of retirement plans by Ken Wundrow of Mennenga Tax and Financial Service in Madison. (Attendance: 100)

December 10, 2014. State of the US Economy by Steve Rick, Director and Chief Economist for Business Development of the CUNA Mutual Group. (Attendance: 92)

February 17, 2015. How to avoid the top ten mistakes made with beneficiary designations by Dera Johnsen-Tracy and John Horn, attorneys from Horn & Johnsen, SC. (Attendance: 57)

March 17, 2015. Managing Post-Retirement Investment Risk by Scott Kornstedt, MBA, CFP, CLU, Mike Filbrandt, CLU, ChFC, chair of the board, and CEO, Jason Mascitti, new business development, and Tim Freischmidt, director of sales and marketing, at Filbrandt and Company, Middleton, Wisconsin. (Attendance: 71)

April 22, 2015. ETF and SWIB update by Michael Williamson, executive director of SWIB, and Robert Conlin, secretary of ETF. (Attendance: 99)

April 29, 2015. The 2015-17 biennial budget and its effects on the University of Wisconsin-Madison by Darrell Bazzell, UW-Madison Vice Chancellor for Finance and Administration. This was a "special seminar" sponsored by the UWRA Board, but CFMR assisted in the planning. (Attendance: 48)

May 19, 2015. The Prudent Retiree: Conserving Modest Assets by Betty Harris Custer of Custer Financial Services, Madison, Wisconsin. (Attendance: 69)

And, upcoming, a special mid-summer seminar:

June 16, 2015. What is Congress doing — or not doing — to protect the health and financial welfare of seniors? by Lisa Lamkins, advocacy director for AARP-WI.

In addition to the seminars listed above, we have written occasional articles that have appeared in *The Sifter*.

Kathleen Irwin and Millard Susman co-chaired the committee this year. They received outstanding support from Bill Richner, who served as Secretary; Paula Romeo and Don Miner, who took care of sound and projection at the seminars; Faisal Kaud, Bill Richner, and Bill Craig, who served as a subcommittee to evaluate ideas for seminar topics; and Bill Craig, who handled facilities reservations. Other members of the committee, all of whom participated in arrangements for the seminars, were Sandy Drew, Bob Dye, Kathy Poi, Karen Goebel, Karen Holden, Larry Rittenberg, Paul Reichel, Jim Skiles, and Kathy Zweifel. Ann Wallace is our priceless supporter and adviser. Sandi Haase has just joined the committee and shares with Don Miner the responsibility for sound and projection arrangements.

The membership of the committee has changed significantly during the past year. Bill Craig, who was a committee veteran and a major contributor to the planning and implementation of our programs, died in March. We mourn his passing. Kathy Poi and Paula Romeo, both key members of our committee will be departing next year. Kathy has served as chair of the committee and as our facilities coordinator. Paula has, with Don Miner, been responsible for technical arrangements for our seminars.

We are eager to have new members of the committee. If you are interested in becoming a member or know someone who would be a terrific candidate, please get in touch with one of the co-chairs of the committee.