



**RETIREMENT
ASSOCIATION**

University of Wisconsin-Madison

UW-Madison Retirement Association
2018-19 Committee on Financial Matters in Retirement Report
Jerry Kulcinski and Jack Sorenson, Co-Chairs

The committee offered the following ten seminars during the 2018-19 academic year:

September 18, 2018: "Taxes . . . Always Changing, Never Boring,"

by Ken Wundrow, EA Experience Consulting

Total Attendance: 122 Food Pantry collection: \$429

October 2, 2018: "2019 It's Your Choice Update,"

by Eileen Mallow, Tara Pray, Arlene Larson, State of Wisconsin Employee Trust Funds

Total Attendance: 149 Food Pantry collection: \$448

November 28, 2018: "My Will Is Not My Estate Plan,"

by Howard Erlanger, Ph.D., Professor Emeritus, UW Law School

Total Attendance: 101 Food Pantry collection: \$481

December 18, 2018: "The Health of the U.S. Economy,"

by Steve Rick, Chief Economist, CUNA Mutual

Total Attendance: 98 Food Pantry collection: \$309

January 15, 2019: "Federal Budget Implications for Future of Medicare and Social Security," *by*

Lisa Lamkins, Wisconsin Association for the Advancement of Retired People

Total Attendance: 70 Food Pantry collection: \$229

February 19, 2019: "Skilled Nursing Facilities in Transition, Emergent Home Care Agencies and Medical Oversight,"

by John Sauer, President and CEO, Leading Age Wisconsin, Mary Ann Drescher, President, Attic Angel Community, Kelsey Abel, Administrator, Recover Health, Zach Grabot, Administrator, Oakwood Village, Tim Conway, Executive Director, Capital Lakes

Total Attendance: 97 Food Pantry collection: \$161

March 5, 2019: "Introduction of the 2019 Revised Living Ledger,"

by Faisal Kaud, Sandi Haase, Millard Susman, Jerry Kulcinski, Karen Holden, Living Ledger Sub-Committee of the Committee for Financial Matters in Retirement

Total Attendance: *Limited to 50 UWRA Members* Food Pantry collection: \$ N/A

March 19, 2019: "The Global Economy,"

by Sara J. Walker, BMO Harris

Total Attendance: 50 Food Pantry collection: \$160

April 16, 2019: "Annual ETF and SWIB Update"

by Robert Conlin, ETF; Rochelle Klaskin and Edwin Denson, SWIB

Total Attendance: 92 Food Pantry collection: \$240

May 21, 2019: "Making Your Money Last in Retirement,"

by Betty Harris Custer, CFP, CRPC

Total Attendance: 70

Food Pantry collection: \$190

The committee has made preliminary plans for seminars for the 2019-20 academic year. The topics include seminars on State health insurance coverages, federal and state tax changes, estate planning, management fees to invest, administer and dissolve a trust, how to protect against identity theft and other economic topics of interest to our members.

Again most of our seminars in the past year have been video recorded by UWRA volunteer Frank Boll. These recordings are available on the UWRA website. They provide an excellent resource, either to refresh one's memory or to catch up on a seminar that might have been missed. Once again, our thanks to Frank for this valuable service to our members.

CFMR MEMBERS DURING 2018-19

- Kathy Christoph
- Ted Collins
- Rick Daluge
- Robert Dye
- Marian Fisher, Secretary
- Joan Gillman
- Sandi Haase, ex officio
- Karen Holden
- Kath Irwin, Immediate Past Co-Chair
- Faisal Kaud, Chair of the programming subcommittee
- Jerry Kulcinski, Co-Chair
- Don Miner, seminar AV specialist
- Greg Moses
- Jurgen Patau, seminar AV specialist
- Paul Reichel
- Kay Reuter-Krohn
- Larry Rittenberg (on sabbatical)
- Jack Sorenson, Co-Chair
- Karen Stauffacher
- Millard Susman
- Kathy Zweifel, facilities coordinator

A special thank you to Kath Irwin who stepped down from her Co-Chair role at the beginning of this year and served as Immediate Past Co-Chair, providing much welcomed guidance and expertise to the committee. Kath will continue on the CFMR as a regular member for 2019-20 for which we are quite grateful.

We do have two announced resignations from the CFMR for 2019-20. These individuals are Greg Moses and Larry Rittenberg, both of whom are very active and, although "retired" still have numerous academic and personal commitments. We will miss their presence and contributions to CFMR.

The *Living Ledger* Sub-Committee of the CFMR consisting of Faisal Kaud, Sandi Haase, Millard Susman, Jerry Kulcinski and Karen Holden deserve special recognition for their efforts in updating the *2019 Revised Living Ledger*; bringing a usable digital age journal to the members of the UWRA. This was a multiple year effort with significant input from friends of the UWRA with specialized expertise to bring this remarkable document to the UWRA membership.