

The SIFTER

A NEWSLETTER OF THE UW-MADISON RETIREMENT ASSOCIATION

on the web at <http://uwra.wisc.edu>

phone 608-262-0641 or email retireassn@mailplus.wisc.edu

Editor: Mary Barnard Ray Layout: Colleen McCabe



RETIREMENT
ASSOCIATION
University of Wisconsin-Madison
January 2016

Financial seminar

by Karen Goebel and Karen Holden, Members, Committee on Financial Matters in Retirement

Financial and health risks in retirement: the protective role of powers of attorney

Tuesday, January 19, 10:00 a.m. to noon
MGE Innovation Center, Research Park,
510 Charmany Drive, Conference Room 50

Financial preparation for retirement typically includes thinking about advanced directives and designating powers of attorney (POA) for health care and finances. Because Wisconsin has standard forms for powers of attorney that reflect basic legal requirements and constraints on that power, many people use those forms without being fully aware of the responsibilities they are giving or accepting. This seminar moves beyond the basic purpose of powers of attorney to address what individuals need to know when they grant that power and what those who agree to assume that role are agreeing to do.

This seminar will focus on questions such as the following.

- Who should be asked to assume power of attorney: are family members the best option?
- Does power of attorney attach to only one person, or is it possible to name alternates?
- What happens if those assuming power of attorney themselves become infirm?
- Who is responsible for overseeing the actions of those to whom power of attorney is granted?
- Can others assume these responsibilities even without formal designation?
- What happens if there is no power of attorney when a person can no longer make those decisions?
- Is there a way to prevent disagreements over decisions made by the individual granted POA?
- What if financial exploitation is suspected?
- What is the relationship between health and financial powers of attorney and health care declaration of incompetence?

This seminar will be presented by **Shanna Knueppel**, a litigator at Murphy Desmond, S.C. who also practices estate planning. The seminar coordinators, Karen Goebel, Emerita Professor in Consumer Science and Extension, and Karen Holden, Emerita Professor from the Department of Consumer Science, may participate in a panel that would draw upon their expertise in this area.

Food pantry contribution

The food pantry recipient for this event will be St. Vincent de Paul. Both cash and checks payable to St. Vincent will be accepted.

Registration

Advance registration is required. Contact the Association office (see masthead), by **Thursday, January 14**, to register. Registrations will be honored until 9:55 a.m., after which nonregistrants will be admitted, space permitting. If you or your companion registered for the seminar but cannot attend, please call 262-0641 by 8:30 a.m. on the day of the program.

Financial seminars are offered free to UWRA members, and members may bring guests who are not members of the Retirement Association. Please indicate that you plan to bring a guest when you register, and include the guest's name.

Are you missing out on a freebie?

by Debra Lauder, Co-Chair, Membership Committee

If you recruit one or more new UWRA members, you'll receive a one-year waiver of your membership dues. When you have recruited a new member, contact the UW-Madison Retirement Association office (see masthead) to let Ann Wallace know. Also please ask your recruit to note your name on the membership form in the section that reads "Did someone recruit you to join UWRA, and if so, whom may we thank?" If a former member has a lapsed membership of more than one year, the person will be considered a new recruit for this promotion and you will get credit for the returning member. Hurry ... this program will end on June 30, 2016.

Saving our stories - tips and guidelines for selecting, organizing, and sharing all those photos and stuff

by Sheila Spear, Co-Chair, Electronic Technology Committee

Thursday February 11, 1:30 to 3:30 p.m.
Fitchburg Public Library, 5530 Lacy Road

Continuing our series aimed at helping us organize our memorabilia, this encore presentation, by **Paul Hedges**, AV Archivist at the Wisconsin State Historical Society, is for those still wondering where to start, how to get going on this project, or whether to undertake it.

The session will be limited to 35 so that people can spend time sharing project ideas and questions in small discussion groups. We invite you to bring examples of projects you have carried out or just your questions about where to start.

To register email retireasn@mailplus.wisc.edu or call the office at 608-262-0641 no later than **Friday, February 5**.

Executive Director's corner

by Ann Wallace

Those of you who enjoy taking day trips organized by someone else will want to look closely at the article elsewhere in this issue written by Bob Blitzke from PLATO, the Participatory Learning and Teaching Organization (plato.wildapricot.org). Very recently the UW-Madison Retirement Association board and the PLATO board entered into an agreement that would invite members of the other organization to participate in trips after members of the sponsoring organization have a sign-up priority. You can see the details in this issue's description of the UWRA's January 20 tour in downtown Madison of two museums and the Capitol. Bob's article and the PLATO website explain that organization's arrangements.

These two organizations, along with the University League, which has been invited to take UWRA trips for several months, have many interests in common. Here is what the PLATO website says:

PLATO is a self-directed, volunteer-led, nonprofit organization serving lifelong learners living in and around Dane County. Members share a passion for learning and a desire to stay engaged with the world and with others who share their interests.

In other words, UWRA members are likely to feel an affinity with PLATO members. Feel free to accept Bob's offer to subscribe to the Monday News Brief.

New: breakfast on the East Side!

by Jeanne Stublaski, Member, Social Committee

I joined the UWRA shortly after I retired in early 2015. I was looking forward to meeting new people and attending different events. I saw that there was a monthly breakfast and thought it would be a great way to meet people and socialize, but I found the breakfast offering to be at Sofra Restaurant in Middleton. I live east, pretty far east, and I seldom travel forty minutes to go to the West Side, let alone for an 8:30 a.m. breakfast. I inquired as to why there was no breakfast on the East Side and, as it turns out, they have wanted one for quite a while. To make a long story short, I found a restaurant on the East Side and am now organizing the event as the newest member of the Social Committee.

Let me tell you a little about Elie's Family Restaurant. Elie's is located at 4102 Monona Drive, Madison, in the Lake Edge Shopping Center where Monona Drive meets with Buckeye Road on the shores of Lake Monona. Elie's is family style and friendly, with very good food; it is clean and bright, and your coffee cup never runs empty. They're great Badger and Packer fans, too.

Please join me for a great breakfast and good conversation. I have set up dates as follows for three months starting in January. We will see how it goes, and hopefully we will have a monthly breakfast on the East Side as well as the West Side. I'm looking forward to meeting you all.

Thursday, January 21 – 8:30 a.m.

Thursday, February 18 – 8:30 a.m.

Wednesday, March 23 – 8:30 a.m.

Sofra breakfasts

The monthly Sofra breakfasts are still open to all, whether you live east or west of downtown. On the dates listed in the calendar, please join the group in Sofra's basement meeting room, always starting at 8:30.

Welcome to these new members of the Association 11-10-15 through 12-10-15

Rebecca & Thomas Butler

Alan & Marie Crist

Cathie Easter

Sharon Hutchinson

Linda Ladwig

Ruth Maschmeier

Jean Tretow-Schmitz & John Schmitz

Eldon & Jean Ulrich

We need your help!

by Chris Kleinhenz, Member, Volunteering Committee

For the past several years, the UW-Madison Retirement Association has honored one of its members with the Volunteer of the Year Award, which recognizes volunteer activities that have had a positive influence and important impact on the retiree community, the university, or the larger community. At the annual meeting last May, Millard Susman was honored for his numerous volunteering activities and contributions to the UW-Madison, to the Wisconsin Academy, and to our Association.

We would like your help in selecting our 2016 recipient. We understand that compiling a complete nomination dossier can be a time-consuming effort; thus, if you would prefer, you can instead just send us the name of a retired and meritorious colleague, together with a short statement concerning that person's contributions. The award will be presented at the annual meeting in the spring. Current UWRA board members are not eligible.

If you are able to send us a complete nomination dossier, here are the guidelines:

- name, address, and email address of nominee;
- name, address, email address, and phone number of the nominator; and
- a statement no longer than two pages outlining the reasons the individual merits this recognition, including mention of where the nominee has been active as a volunteer, the specific nature of the volunteer responsibilities and activities, leadership roles, length of service times, and a description of the benefits and impact of the nominee's work.

Please send your nominations or complete dossier by Monday, February 29, by email (preferred) to retireassn@mailplus.wisc.edu or by postal mail to UW-Madison Retirement Association, 21 North Park Street, Room 7229, Madison, WI 53715-1218.

An invitation to join PLATO field trips

by Bob Blitzke, Field Trip Coordinator, PLATO

PLATO provides an average of 20 field trips each year to its membership, primarily midweek daytrips to cultural and educational opportunities in Milwaukee, other parts of Wisconsin, Chicago, and northern Illinois. Since some seats go unfilled, we invite our UW-Madison Retirement Association friends to join our four PLATO field trips in February and March. We hope this collaborative venture will be of ongoing mutual interest to our respective organizations.

PLATO field trips

- Sunday, February 28, 2:00 p.m. "The devil's music: the life and blues of Bessie Smith," Milwaukee Rep, Stackner Cabaret
- Wednesday, March 9, 1:30 p.m. "The invisible hand," Milwaukee Rep, Stiemke Studio
- Friday, March 18, 10:00 a.m. "Art in bloom 2016," Milwaukee Art Museum
- Saturday, March 19, 5:00 p.m. "Paths to the summit," Ensemble Constantinople concert, "Early music now," UW-Milwaukee, Zelazo Center

Registration

Registration begins two weeks prior to the registration deadline and ends with that deadline or a filled bus, whichever comes first. To register, mail in the registration form with your payment by check. The registration fee for non-PLATO guests is \$15 over the PLATO member rate.

To learn more, contact Bob Blitzke at blitzke@gmail.com or 608-271-7741. For the best source of information for all trips, sign up for the weekly *Monday News Brief* email newsletter by sending an email to bblitzke@gmail.com with subject: "UWRA Subscribe MNB." Alternatively, check out the PLATO website at platomadison.org/page-18561, which contains good information about the one or two active trips and how to register. This site also includes list of recent trip offerings.

Attic Angel continuing education for seniors

The continuing education programs of the Attic Angel Association are held each Monday morning at Attic Angel Place, 8301 Old Sauk Road, Middleton. The programs are open to the public. Coffee is served at 10 a.m., and the program begins at 10:30. There is no charge, and no reservation is required.

January 4: "Senior issues and the government in 2016" by Lisa Lamkins, advocacy director for federal issues, AARP.

January 11: "We gotta get out of this place: a soundtrack of the Vietnam War" by Douglas Bradley, author and Vietnam veteran.

January 18: "America's first great judges" by John Kaminski, historian, UW-Madison History Department.

January 25: "The life and poetry of Wendell Berry: a fresh and hopeful voice in a troubled culture" by Kenneth Hindman, retired Presbyterian pastor and professor.

The Sifter
<http://uwra.wisc.edu>
UW-Madison Retirement Assn
c/o Division of Continuing Studies
21 North Park Street, Room 7229
Madison, WI 53715-1218

Non-Profit Org.
U.S. Postage
Paid
Madison, Wisconsin
Permit No. 658

Moved or Moving?

The Sifter will not automatically be forwarded by the Postal Service. Please use email, snail mail, or the telephone to give us your new address so that you can continue to receive *The Sifter* on a regular basis.

UWRA Calendar

| | | |
|-------------|---------------------------------|-----------------------------|
| January 14 | Social Committee | Breakfast at Sofra |
| January 19 | Financial Committee | Roles of powers of attorney |
| January 20 | Travel Committee | Museums and state capitol |
| January 21 | Social Committee | Breakfast at Elie's |
| February 11 | Electronic Technology Committee | Saving our stories |
| February 12 | Social Committee | Breakfast at Sofra |
| February 18 | Social Committee | Breakfast at Elie's |
| February 29 | Social/ETC Committees | Photo contest deadline |

For more about UWRA and for some program information, please visit our website at uwra.wisc.edu.