Committee on Financial Matters in Retirement
2009-2010 Report to the Board of Directors

1. The Committee on Financial Matters in Retirement (CFMR) held ten committee meetings during the July 1, 2009, to June 30, 2010, academic year.

2. CFMR also planned, organized, and presented nine seminars:

**Tuesday, September 15, 2009**

**Topic:** Fundamental Concepts of Investing  
**Speakers:** Stephen Hawk (Northern Capital Management) and James Hamre (UW School of Business – Retired)  
**Location:** MGE Innovation Center

**Tuesday, October 20, 2009**

**Topic:** Managing Investment Pathways As We Age  
**Speakers:** Molly McCarragher and Tom Buresh (Suby Von Haden & Associates)  
**Location:** MGE Innovation Center

**Monday, November 16, 2009**

**Topic:** Tax Planning Strategies in an Ever-Changing Environment  
**Speaker:** Ken Wundrow (Mennenga Tax & Financial Services)  
**Location:** MGE Innovation Center

**Tuesday, December 15, 2009**

**Topic:** Tax Management and Roth Conversions  
**Speaker:** Brent Lindell (Savant Capital Management)  
**Location:** MGE Innovation Center

**Wednesday, January 20, 2010**

**Topic:** An Assessment of Economic Trends and the Implications for 2010  
**Speaker:** Steve Rick (CUNA)  
**Location:** CUNA International Building

**Wednesday, February 17, 2010**

**Topic:** Consumer Protection Update  
**Speaker:** Glen Loyd  
**Location:** MGE Innovation Center

**Tuesday, March 16, 2010**

**Topic:** Investment Resources at the Madison Public Library
Tuesday, April 20, 2010
Topic: ETF and SWIB
Speakers: Keith Bozarth (SWIB) and David Stella (ETF)
Location: MGE Innovation Center

Tuesday, May 18, 2010
Topic: The State Budget—How Bad Is It and What Needs to be Done to Truly Balance It
Speaker: Todd Berry (Wisconsin Taxpayers Alliance)
Location: MGE Innovation Center

3. CFMR planned and developed *A Companion Guide for Health-Related Services and Facilities*. UWRA had the Guide printed and it is being sold to UWRA members.

4. CFMR has recruited four new members for 2009-2010 and has elected officers to run the committee during 2009-2010.

5. CFMR has begun the planning for nine seminars for 2010-2011.

This report was prepared by Jim Hamre, CFMR Chair during 2009-2010.