1. The Committee on Financial Matters in Retirement (CFMR) held eight committee meetings during the July 1, 2010 to June 30, 2011 academic year.

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

   **Tuesday, September 21, 2010**
   
   Topic: Global Investment: Opportunities and Risks  
   Speakers: Mike Harmelink and Nick Stanton (State of Wisconsin Investment Board)  
   Location: MGE Innovation Center

   **Tuesday, October 19, 2010**
   
          2. Group Health and Medigap Supplement Alternatives, Long-term Care and SHIP  
   Speakers: 1. Faisal Kaud and Patricia Lasky (UWRA)  
             2. Sam Johnson and Vickie Buchholz (Board on Aging and Long-term Care)  
   Location: Capitol Lakes

   **Wednesday, November 17, 2010**
   
   Topic: Taxes….. An Uncertain Future  
   Speaker: Ken Wundrow (Mennenga Tax & Financial Services)  
   Location: MGE Innovation Center

   **Wednesday, December 15, 2010**
   
   Topic: State of the Economy  
   Speaker: Steve Rick (CUNA)  
   Location: MGE Innovation Center

   **Tuesday, January 18, 2011**
   
   Topic: How to Manage One’s Personal Investments  
   **Speaker:** Brent Lindell and Tawn Jacobs (Savant Capital Management, Inc.)  
   Location: MG&E Innovation Center

   **Tuesday, February 15, 2011**
   
   Topic: Preventing Financial Fraud  
   **Speaker:** Susan Schilz (DTACP) and Patricia Struck (Dept. of Financial Institutions)  
   Location: Capitol Lakes
Wednesday, March 9, 2011
Topic: Trusts and Estate Planning
Speakers: Mark Bradley (Ruder Ware)
Location: MGE Innovation Center

Tuesday, April 19, 2011
Topic: ETF and SWIB
Speakers: Keith Bozarth (SWIB) and David Stella (ETF)
Location: CUNA

Tuesday, May 17, 2011*
Topic: Understanding How Your WRS Health Insurance Works for You
Speaker: Vickie Baker (ETF)
Location: CUNA

* Note – this program had a record attendance of 177 participants


5. CFMR has begun the planning for nine seminars for 2011 – 2012.

This report prepared by Kathy Poi, CFMR Chair during 2011 – 2012.