ANNUAL REPORT OF THE COMMITTEE ON FINANCIAL MATTERS IN RETIREMENT
Prepared by Millard Susman, Co-Chair

The Committee has held nine meetings during the 2013-14 academic year and has organized ten financial seminars. The seminars and the speakers at the seminars were as follows:

9/26/13, Todd Berry, Wisconsin’s biennial budget 2013-15
10/15/13, Ken Wundrow, Where did I put that old retirement plan?
11/25/13, Phil Harris, 2013 personal income tax revisions
12/11/13, Steve Rick, U.S. Economic Outlook
1/16/14, Robert McCalla, Long-Term Care Needs in Retirement: Options, Choices, Challenges
2/18/14, Ann Albert and Brenda Haskins, Aging at Home: Services, Resources, and Financial Decisions
3/18/14, Tom Buresh and Michael Tomaw, What sort of financial planner, broker, or accountant serves your best interest?
4/15/14, Michael Williamson and Robert Conlin, ETF and SWIB Update
5/20/14, Christine Benz, Making Your Money Last in Retirement: Key Ways to Meet the Challenge(s)
7/16/14, Ann Albert, The Village Movement: What is it, and how can it help to support aging citizens of the greater Madison area?

All of the seminars that have already been presented have received enthusiastic evaluations from the members who attended.

Don Klimpel 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 Bob Dye, Kathy Poi, Karen Goebel, Kathy Irwin, Larry Rittenberg, Peter Monkmeyer, Paul Reichel, Jim Skiles, and Kathy Zweifel. Ann Wallace is our priceless supporter and adviser.

The committee will be losing Peter Monkmeyer, who has decided to resign at the end of this year. We are eager to have more members and would welcome volunteers. If you are interested in serving on the committee, contact either Millard Susman or Kathy Irwin, who will be co-chairs next year.

We have made a policy change this year: We will now allow members to bring guests to our seminar at no charge. Members may bring one guest to a seminar and may bring guests to a total of three seminars.

We learned from a survey conducted at one of our seminars this year that members would welcome the addition of some seminars during the summer months. We have, therefore, arranged a seminar by Ann Albert on July 16, 2014. She will talk about the “village movement” — an idea that is catching on nationwide — that helps older citizens maintain their health and remain in their own homes. We hope that we have a full house for this interesting summer program.