



OVERVIEW:

The Committee on Financial Matters in Retirement (CFMR) presented nine Virtual Seminars during the 2022-2023 year. The listing of these seminars is included in this report. Given the complexity of two of the subjects, two subcommittees were formed to organize topics and arrange speakers. The “Resources for Retiring Your Way” subcommittee included: Faisal Kaud, Chair, Millard Susman, Sandi Haase, Mel Morganbesser, Bob Dye and Jack Sorenson. The “Estate Planning Series” subcommittee included: Tom Eggert, Chair, Sandi Haase, Jurgen Patau and Jack Sorenson. This three-part series was favorably received by the UWRA membership.

Committee planning for the 2023-24 year is well under way. We hope the UWRA membership will find them informative and useful.

PERSONAL ACKNOWLEDGEMENTS:

A large thank you to Executive Director Sandi Haase for her efforts and commitment to the UWRA – she has been an excellent Executive Director and CFMR colleague over the years. We look forward to her continued association with CFMR. Thanks to CFMR member, Marian Fisher, for her excellence and patience as CFMR Secretary; and to Don Miner and Jurgen Patau, who served as technical audiovisual specialists, ensuring our committee meetings and the Zoom Webinars ran smoothly. And finally, to the CFMR committee members, listed at the end of this report, for their superb efforts, attitudes and dedication to bring financial information relevant to the retirees of all the UWRA membership – THANK YOU!

The committee offered the following virtual seminars during the 2022-23 academic year:

September 19, 2022: “Navigating and Accessing Local Resources for Retiring Your Way”

with Angela Velasquez, Sridevi Mohan and Jennifer Fischer, Area Agency on Aging (Dane County DHS)

Coordinators: Faisal Kaud and Jack Sorenson

Evaluations: Overall satisfaction with speaker on a score of 1-5: 4.61

Overall satisfaction with Information provided on a score of 1-5: 4.72

October 10, 2022: “2023: It’s Your Choice State Health Insurance Update. What’s New?”

Presented by Employees of the State of Wisconsin Employee Trust Funds

Coordinators: Kathy Zweifel and Millard Susman

Evaluations: Overall satisfaction with speaker on a score of 1-5: 4.60

Overall satisfaction with Information provided on a score of 1-5: 4.62

November 14, 2022: “Income Tax Preparation in Today’s World”

Presented by Paul Swanson, Head, Dane County Volunteer Income Tax Assistance

Coordinators: Faisal Kaud, Tim Norris and Don Miner

Evaluations: Overall satisfaction with speaker on a score of 1-5: 4.22

Overall satisfaction with Information provided on a score of 1-5: 4.26

December 14, 2023: “The Health of the U.S. Economy,”

with Steve Rick, Chief Economist, CUNA Mutual

Coordinators: Joan Gillman and Kay Reuter-Krohn

Evaluations: Overall satisfaction with speaker on a score of 1-5: 4.94

Overall satisfaction with Information provided on a score of 1-5: 4.94

January 12, 2023: “Estate Planning Series #1: What is Estate Planning? And Why Consider It” with Attys.

Stephanie Thompson and Sadie Minobe, Law Offices of Krueger, Hernandez and Thompson

Coordinators: Jack Sorenson and Karen Holden

Evaluations: Overall satisfaction with speaker on a score of 1-5: 4.47

Overall satisfaction with Information provided on a score of 1-5: 4.39

February 07, 2023: “Estate Planning #2: Wills, Trusts and Direct Transfers”

with Atty. Peter Osman, Borakove, Osman, LLC

Coordinators: Tom Eggert and Rick Daluge

Evaluations: Overall satisfaction with speaker on a score of 1-5: 4.82

Overall satisfaction with Information provided on a score of 1-5: 4.84

March 7, 2023: “Estate Planning #3: Planning for the Dissolution of Your Estate”

with Atty. Peter Osman, Borakove, Osman, LLC

Coordinators: Jack Sorenson and Kathy Zweifel

Evaluations: Overall satisfaction with speaker on a score of 1-5: 4.92

Overall satisfaction with Information provided on a score of 1-5: 4.94

April 13, 2023: “The State of ETF and SWIB: An Update”

with John Voelker, Secretary, ETF, Rochelle Klaskin, Deputy Executive Director, SWIB & CAO, Edwin Denson, SWIB Exec. Dir/Chief Investment Officer, and Todd Mattina, Economist

Coordinators: Millard Susman and Mel Morgenbesser

Evaluations: Overall satisfaction with speaker on a score of 1-5: 4.91

Overall satisfaction with Information provided on a score of 1-5: 4.89

May 10, 2023: “How to Access Funding from the Inflation Reduction Act (IRA) for Home Weatherization, Electrification of Your Home and Electric Vehicle Purchases: What Every Homeowner Should Know”

With Katherine Kuntz, Director, Dane County Office of Energy and Climate Change

Coordinators: Tom Eggert and Jurgen Patau

Evaluations: Overall satisfaction with speaker on a score of 1-5: 4.96

Overall satisfaction with Information provided on a score of 1-5: 4.96

The Committee for Financial Matters in Retirement members for 2022-2023 are/were

Tim Chybowski – *new member/partial year*

Rick Daluge

Laura Daguid – *new member*

Robert Dye

Tom Eggert

Marian Fisher – *Secretary, also Secretary, UWRA Board of Directors*

Joan Gillman

Sandi Haase – *also UWRA Executive Director*

Karen Holden

Faisal Kaud – *on leave partial year*

Don Miner – *technical audio-visual specialist*

Mel Morganbesser

Ken Mount – *new member*

Tim Norris

Jurgen Patau – *Co-Chair, also UWRA Board Member and technical audio-visual specialist*

Paul Reichel

Kay Reuter-Krohn

Jack Sorenson – *Co-Chair*

Millard Susman

Kathleen Zweifel