



# Retirement Association

UNIVERSITY OF WISCONSIN-MADISON

## 2021-22 Report

Committee on Financial  
Matters in Retirement

Jack Sorenson & Jurgen Patau,  
Co-Chairs

### **OVERVIEW:**

The Committee on Financial Matters in Retirement (CFMR) presented nine Virtual Seminars during the 2021-2022 year. The listing of these seminars is included in this report.

The committee has been planning for the 2022-23 seminars. The topics tentatively booked include: State of Wisconsin 2023 health insurance coverages; federal and state tax changes; The health of the U.S. economy; ETF and SWIB annual reports; Staying in Your Home or Moving to a Senior Living Community – Financial and Other Considerations; What is Estate Planning?; Wills vs. Trusts; and, Planning for the Dissolution of Your Estate.

Continued concern exists over the impacts of COVID-19 on our Retirement Community partners; their residents are of a vulnerable age, and there is understandable reluctance to invite large numbers of non-resident retirees into their facility. If and when these facilities “open up,” decisions on whether to host large audiences or to continue with virtual presentations or introduce a combination hybrid forum are still under consideration. However, through December, 2022 UWRA will continue to provide virtual programs only.

### **PERSONAL ACKNOWLEDGEMENTS:**

A large round of applause to Executive Director Sandi Haase for her efforts to make Zoom Webinar work and to make herself available to host every meeting and seminar – our year would not have been without Sandi’s work. And thanks also to the BOOT team, Barbara Rust and Larry Winkler, for all of their assistance in making WILD APRICOT function. Thanks to CFMR members, Don Miner and Jurgen Patau, who served as technical audiovisual specialists, ensuring the Zoom Webinars ran smoothly; and to Marian Fisher for her excellence and patience as CFMR Secretary. And finally to the CFMR committee members, listed at the end of this report, for their superb efforts, attitudes and dedication to bring relevant financial information to the UWRA membership – THANK YOU!

### **The committee offered the following virtual seminars during the 2021-22 academic year:**

**September 28, 2021: “Can We Afford Retirement as We Age?”** by *Helen Marks Dicks, John Sauer & Tim Schiefelbein*

Coordinators: Rick Daluge, Paul Reichel and Karen Holden

Evaluations: Overall satisfaction with speaker on a score of 1-5: 4.88

Overall satisfaction with Information provided on a score of 1-5: 4.79

**October 12, 2021: “2022 Health Benefit Update,”** by *State of Wisconsin Employee Trust Funds*

Coordinators: Millard Susman and Kathy Zweifel

Evaluations: Overall satisfaction with speaker on a score of 1-5: 4.74

Overall satisfaction with Information provided on a score of 1-5: 4.65

**November 16, 2021: “The More Things Change, The More They Stay the Same”** by Ken Wundrow, EA  
*Experience Consulting*

Coordinators: Paul Reichel and Faisal Kaud

Evaluations: Overall satisfaction with speaker on a score of 1-5: 4.87

Overall satisfaction with Information provided on a score of 1-5: 4.83

**December 12, 2016: “The Health of the U.S. Economy,”** by Steve Rick, Chief Economist, CUNA Mutual

Coordinators: Joan Gillman and Kay Reuter-Krohn

Evaluations: Overall satisfaction with speaker on a score of 1-5: 4.90

Overall satisfaction with Information provided on a score of 1-5: 4.90

**January 25, 2022: “Cryptocurrencies and Blockchain Technology - Explained”** by Sahilesh Shah from Coinbase  
and Brad Chandler, Faculty Associate, UW School of Business

Coordinators: Thomas Eggert and Jack Sorenson

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

Overall satisfaction with Information provided on a score of 1-5: 4.64

**February 08, 2022: “Making Your Money Last as Long as You Do”** by Scott LaMontagne,  
*Edward Jones*

Coordinators: Karen Holden and Jack Sorenson

Evaluations: Overall satisfaction with speaker on a score of 1-5: 4.30

Overall satisfaction with Information provided on a score of 1-5: 4.30

**March 15, 2022: “Building Your Portfolio for the Best Return with the Least Risk and with the  
Greatest Peace of Mind”** by Paul Merriman, Merriman Financial Education Foundation

Coordinators: Faisal Kaud and Kathy Zweifel

Evaluations: Overall satisfaction with speaker on a score of 1-5: 4.30

Overall satisfaction with Information provided on a score of 1-5: 4.24

**April 12, 2022: “Annual ETF and SWIB Update”** by John Voelker, Secretary, ETF, Rochelle Klaskin, Deputy  
Executive Director, SWIB & CAO, and Edwin Denson, SWIB Exec. Dir/Chief Investment Officer

Coordinators: Millard Susman and Kay Reuter-Krohn

Evaluations: Overall satisfaction with speaker on a score of 1-5: 4.70

Overall satisfaction with Information provided on a score of 1-5: 4.78

**May 10, 2022: “A Bucket Approach to Investing and Drawing Out Funds throughout Retirement”** by  
*Christine Benz, Morningstar*

Coordinators: Paul Reichel and Faisal Kaud

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

Overall satisfaction with Information provided on a score of 1-5: 4.92

### **CFMR MEMBERS DURING 2020-2021**

Rick Daluge

Robert Dye

Tom Eggert

Marian Fisher, Secretary

Joan Gillman

Sandi Haase, ex officio

Karen Holden

Faisal Kaud

Don Miner, seminar AV specialist

Mel Morgenbesser

Tim Norris

Jurgen Patau, Co-Chair, seminar AV  
specialist

Paul Reichel

Kay Reuter-Krohn

Jack Sorenson, Co-Chair

Millard Susman

Kathy Zweifel