



## Financial Planning Awareness & Pre-Retirement Planning

February 16, 17 & 18, 2010

A series of seminars designed to help University of Kansas faculty and staff plan for financial security and an enjoyable retirement.

Reservations are not required. These seminars are free of charge and open to all University faculty, staff and their families. These seminars are not intended to provide individual investment advice.

### *Schedule*

#### **Tuesday, February 16, 2010**

##### Social Security Benefits in Retirement **9:00 - 11:30 (Big 12 Room, Kansas Union)**

When to apply for benefits, spouse and widow benefits, taxation of Social Security benefits, working after retirement, and Medicare issues.

Presenter: Ann Woodbury, Lawrence Social Security Office

##### Health Insurance after Retirement **1:00 – 4:00 (Big 12 Room, Kansas Union)**

Continuation of the State of Kansas/University health insurance plans after retirement and Medicare issues.

Presenter: Kansas Health Policy Authority

#### **Wednesday, February 17, 2010**

##### KPERS Benefits in Retirement **9:00 – 11:30 (Big 12 Room, Kansas Union)**

Requirement for age and years of service at retirement, computing your benefit, partial lump sum income option, survivor options, taxes, working after retirement, buyback options, and new legislation.

Presenter: Kansas Public Employees Retirement System (KPERS)

##### Concepts in Investment Planning **1:00 – 3:30 (Big 12 Room, Kansas Union)**

Understanding investment risk, investment terms and concepts, capital preservation, diversification and the use of investments in estate planning.

Presenter: ING

**Thursday, February 18, 2010**

Wills, Trusts & Estate Planning

**9:00 – noon (Big 12 Room, Kansas Union)**

Overview of estate planning, probate, wills, trusts, living trusts and taxes, and planning for incapacity.

Presenter: Craig C. Reaves, J.D., CELA, ChFC, CLU, Reaves Law Firm, P.C.

Long Term Care

**1:30 – 4:30 (Big 12 Room, Kansas Union)**

Overview of what long term care is and how to pay for it. Review long term care insurance policy options, including what to watch for when selecting long term care insurance. Overview of Medicaid eligibility requirements and decisions regarding excess resources.

Presenter: Craig C. Reaves, J.D., CELA, ChFC, CLU, Reaves Law Firm, P.C