



Retirement Planning Seminar

Course Objective

The NRECA Retirement Planning Seminar is designed for employees and their spouses who are within five to ten years of retirement. It helps employees evaluate distribution options from their retirement plans, estimate retirement income and expenses, and realize the need for continued investment during retirement years. Local experts in the area of Social Security and estate planning are included in the program. Health and long-term care issues are also addressed.

Key Topics Include:

- NRECA retirement benefits
- Investment planning/asset allocation
- Social Security
- Health and long-term care
- Retirement distribution strategies
- Legal and estate planning
- Estimating retirement income
- Ins and outs of IRAs

February 25–26, 2010

Holiday Inn Express

W10170 Highway 54 East
Black River Falls, WI

Hotel Room Block
(715) 284-0888

Rate: \$94.99 + tax

Room block name: COP

Room block will be held until
February 4, 2010

Pricing

The program will be billed at cost. If 20 or more employees, enrolled in both the NRECA RS and 401(k) plans attend the seminar, there will be no program fee. Otherwise, the cost will be divided equally among participants. Meal and break charges will be billed at cost.

Agenda

Day One

8:30 a.m.	Registration
9:00 a.m.	Introduction
10:15 a.m.	Break
10:30 a.m.	NRECA Retirement Benefits
12 noon	Lunch
1:00 p.m.	Social Security
2:00 p.m.	Break
2:15 p.m.	Individual Retirement Accounts (IRAs)
3:00 p.m.	Homestead Funds
3:30 p.m.	Calculating Retirement Needs & PIRC
4:00 p.m.	Adjourn

Day Two

8:30 a.m.	Refreshments
8:45 a.m.	Understanding & Managing Your Retirement Distributions
10:30 a.m.	Break
10:45 a.m.	Legal Affairs & Estate Planning
12 noon	Lunch
1:00 p.m.	Protecting Your Assets
1:45 p.m.	Break
2:00 p.m.	Financial Services & Final Summary
3:00 p.m.	Adjourn

Retirement Planning Seminar

February 25–26, 2010

Holiday Inn Express

Black River Falls, WI

Organization Name _____

Address _____ City, State, Zip _____

Contact Person _____ Phone (_____) _____ Email _____

Registrations are due by Wednesday, January 20, 2010

~~Please fax your registration form to (608) 258-4407~~

1. Employee _____ SSN# _____ - _____ - _____

Spouse (if attending) _____

2. Employee _____ SSN# _____ - _____ - _____

Spouse (if attending) _____

3. Employee _____ SSN# _____ - _____ - _____

Spouse (if attending) _____

4. Employee _____ SSN# _____ - _____ - _____

Spouse (if attending) _____

5. Employee _____ SSN# _____ - _____ - _____

Spouse (if attending) _____

6. Employee _____ SSN# _____ - _____ - _____

Spouse (if attending) _____

7. Employee _____ SSN# _____ - _____ - _____

Spouse (if attending) _____

8. Employee _____ SSN# _____ - _____ - _____

Spouse (if attending) _____

Registrations are on a first-come, first-serve basis.

The program will be billed at cost. If 20 or more employees, enrolled in both the NRECA RS and 401(k) plans attend the seminar, there will be no program fee. Otherwise, the cost will be divided equally among participants. Meal and break charges will be billed at cost. An invoice will be itemized and sent to your cooperative at the conclusion of the program.