

RETIREMENT PLANNING SEMINAR

January 8, 2010

**Eben Holden Conference Center, St. Lawrence University
Canton, NY**

- 7:30-8:00** **Registration** **Eben Holden Center**
- 8:00-8:15** **Opening and Welcome** **Eben Holden Center**
Debra Mousaw, Associate Director of Human Resources, St. Lawrence University
Valerie Lehr, Vice President and Dean of Academic Affairs, St. Lawrence University
- 8:15-9:15** **Social Security and Medicare** **Eben Holden Center**
Tammy Finnegan, Field Representative, Social Security Administration
- 9:15-9:30** **Break**
Tammy Finnegan will be available for individual questions
- 9:30-10:30** **Social Security and Medicare continued** **Eben Holden Center**
- 10:30-10:40** **Break**
Tammy Finnegan will be available during this break and until 11:00 for individual questions
- 10:40-11:00** **Importance of Physical Activities** **Eben Holden Center**
Michele LeRoux, Physical Rehabilitation Director, Canton Potsdam Hospital
- 11:00-12:00** **TIAA-CREF plans for St. Lawrence and Clarkson employees**
Eben Holden Center
David Howe, Registered Representative, TIAA/CREF Individual and Institutional Services, Inc.
- TIAA-CREF plans for SUNY employees** **Eben Holden Center North**
Robert Polak, Registered Representative, TIAA/CREF Individual and Institutional Services, Inc.
- ERS and TRS for SUNY Employees** **Eben Holden Center South**
David Morrell, University Wide Benefits Administrator, SUNY System Administration
- 12:00-12:45** **Lunch**
- 12:45-1:45** **Living well in retirement: Managing your income, expenses and estate**
Eben Holden Center
Christine B. Lennon, CFP®, Wealth Management Advisor, TIAA-CREF Individual and Institutional Services, Inc.

1:45-2:00 **Break**

2:00-2:15 **Volunteering in Retirement** **Eben Holden Center**
Toby White, Director of Experiential Education and EAP Coordinator, SUNY Potsdam

2:15-3:15 **SUNY Health Insurance** **Eben Holden Center South**
Sheila Scott, Benefits Administrator, SUNY Potsdam
Nancy Rowledge, Health Benefit Administrator, SUNY Canton

Frozen Supplemental Retirement Plan for Faculty and Administrative Staff at St. Lawrence **Eben Holden Conference Room**
Debra Mousaw, Associate Director of Human Resources, St. Lawrence University

Clarkson Retiree Health Insurance **Eben Holden Center North**
Presenter's Name TBA, Clarkson University