

2017 Retirement Seminar



2017 Retirement Planning Seminar Agenda

Fort Lauderdale City Hall, 100 N. Andrews Ave., First Floor Commission Chambers

Wednesday, December 6, 2017

- 8:30 – 8:45 **Welcome**
 Michael Dew, P&F Board Chairman
 John Stahl, GERS Board Chairman
- 8:45 – 9:45 **Estate Planning for Your Family’s Future**
 Shane Kelley, Kelley Law Firm
- 9:45 – 10:30 **Tax Mistakes to avoid in Retirement**
 Mitchell J. Margolies, CPA
- 10:30 – 10:45 **Break**
- 10:45 – 11:45 **Social Security: Understanding your Retirement**
 Fred Nesbitt
- 11:45 – 12:00 **Final Check**
 Debi Donato, City of Fort Lauderdale
- 12:00 – 1:15 **Deferred Comp Lunch Break-Out Sessions**
- Your 457(b) Deferred Compensation Plan**
 Al Pinzon, Nationwide
- I am nearing Retirement, Now What?**
 Yolanda Flores and Hortensia Perez, ICMA-RC
- 1:15 – 1:35 **City Benefits at Retirement**
 Lloyd Rhodes & Guy Hine, City of Fort Lauderdale
- 1:35 – 2:00 **Medicare Insurance**
 David Gluckman, United Healthcare
- 2:00 – 2:30 **Police and Fire Pension Update and Questions**
 Lynn Wenguer, P&F Executive Director
- General Employees Questions and Answers**
 Nicholas Shiess, GERS Plan Administrator

IN ACCORDANCE WITH THE AMERICANS WITH DISABILITIES ACT OF 1990. PERSONS NEEDING A SPECIAL ACCOMMODATION TO PARTICIPATE IN THIS PROCEEDING SHOULD CONTACT LYNN WENGUER NO LATER THAN FOUR DAYS PRIOR TO THE PROCEEDING. TELEPHONE (954) 828-5595 FOR ASSISTANCE: IF HEARING IMPAIRED, TELEPHONE THE FLORIDA RELAY SERVICE NUMBERS (800) 955-8771 (TDD) OR (800) 955-8770 (VOICE) FOR ASSISTANCE. IF A PERSON DECIDES TO APPEAL ANY DECISION MADE BY THE BOARD WITH RESPECT TO ANY MATTER CONSIDERED AT THIS MEETING OR HEARING, HE WILL NEED A RECORD OF THE PROCEEDINGS, AND FOR SUCH PURPOSE, HE MAY NEED TO ENSURE THAT A VERBATIM RECORD OF THE PROCEEDING IS MADE, WHICH RECORD INCLUDES THE TESTIMONY AND EVIDENCE UPON WHICH THE APPEAL IS TO BE BASED. FLORIDA STATUTES 286.0105 THIS MEETING MAY BE CONDUCTED BY MEANS OF OR IN CONJUNCTION WITH COMMUNICATIONS MEDIA TECHNOLOGY, SPECIFICALLY A TELEPHONE CONFERENCE CALL. THE LOCATION, 888 S ANDREWS AVENUE, SUITE 202, FORT LAUDERDALE, FLORIDA, WHICH IS OPEN TO THE PUBLIC, SHALL SERVICE AS AN ACCESS POINT. TWO OR MORE FORT LAUDERDALE CITY COMMISSIONERS OR MEMBERS OF A CITY OF FORT LAUDERDALE ADVISORY BOARD MAY BE IN ATTENDANCE AT THIS MEETING.

* Keep in mind that your comments and information will become part of the official public record. If you do not want your personal

record included in the official record, do not

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