

2016 Retirement Planning Seminar Agenda

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

Friday, September 23, 2016

- 8:30 – 8:45 **Welcome**
Michael Dew, P&F Board Chairman
Jon Stahl, GE Board Vice-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 Planning**
Mitchell J. Margolies, CPA
- 10:30 – 10:45 **Break**
- 10:45 – 11:15 **Understanding your Social Security Benefits**
Fred Nesbitt
- 11:15 – 11:30 **Final Check**
Debi Donato, City of Fort Lauderdale
- 11:30 – 12:45 **Deferred Comp Lunch Break-Out Sessions**
- Approaching Retirement**
Al Pinzon, CFP, Nationwide
- How much will Retirement Cost**
Yolanda Flores, ICMA-RC and Hortensia Perez, CFP, ICMA-RC
- 12:45 – 1:15 **Important and Useful Information about City Benefits at Retirement & Beyond**
Michael Naftaniel, City of Fort Lauderdale and Barbara Stanley, FOP
- 1:15 – 1:35 **Medicare Options**
Barbara Stanley, FOP and David Gluckman, United Healthcare
- 1:35 – 2:00 **Helping you Plan for Long Term Care**
Stavros Moforis, Principal Financial Group
- 2:00 – 2:30 **Police and Fire Pension Update and Questions**
Lynn Wenguer, P&F Plan Administrator
- General Employees Questions and Answers**
Nicholas Schiess, General Employees Administrator

Presented by: City of Fort Lauderdale Police Officers and Firefighters’ Retirement System and General Employees’ Retirement System

TWO OR MORE FORT LAUDERDALE CITY COMMISSIONERS OR MEMBERS OF A CITY OF FORT LAUDERDALE ADVISORY BOARD MAY BE IN ATTENDANCE AT THIS MEETING.

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

IN ACCORDANCE WITH THE AMERICAN WITH DISABILITIES ACT OF 1990, PERSONS NEEDING A SPECIAL ACCOMMODATION TO PARTICIPATE IN THIS PROCEEDING OR READING AGENDAS AND MINUTES 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.

THIS MEETING MAY BE CONDUCTED BY MEANS OF OR IN CONJUNCTION WITH COMMUNICATIONS MEDIA TECHNOLOGY, SPECIFICALLY A TELEPHONE CALL. THE LOCATION, 100 N. ANDREWS AVE, FORT LAUDERDALE, FLORIDA, WHICH IS OPEN TO THE PUBLIC, SHALL SERVICE AS AN ACCESS POINT.