

WV Retirement Plus Benefit and Payroll Coordinator 2012 Training Seminar Agenda

Date: March 14, 2012

Time: 8:00 am to 12:00 pm

Location: Holiday Inn and Suites, South Charleston

- 8:00 - 9:00 **Conference Registration and Breakfast Buffet**
- 9:00 - 9:05 **Welcome – John D. Perdue, State Treasurer**
- 9:05 - 9:35 **Why Choose WV Retirement Plus? – John Fisher, Treasurer’s Office**
- Overview of the 457 Plan
 - Benefits of participation
 - Automatic enrollment for new hires
 - What is new in 2012?
- 9:35 – 9:45 **Question and Answer Session**
- 9:45 - 10:00 **Smart 529 Updates – David Garcia, Hartford**
- Enrollment basics
 - Automatic payroll deduction
 - Smart Savings Matching Program
- 10:00 - 10:15 **Break**
- 10:15 – 10:45 **Retirement Strategies for 457 Plan Participants – Steve Kerns, ING**
- Learn how employees of retirement age can maximize their savings
 - Distribution options for employees resigning or retiring
 - Benefit/Payroll Coordinator’s role in the timing of employees accessing their retirement funds
- 10:45 – 11:00 **Question and Answer Session**
- 11:00 to 11:30 **Understanding Social Security Benefits and New Law Changes –
Addam Whittington, Social Security Administration**
- Social Security’s intended role in your financial future
 - Who is entitled to receive Social Security?
 - How is your benefit determined?
 - Retirement, survivor, disability and spousal benefits
 - Medicare Overview
- 11:30 – 11:45 **Question and Answer Session**
- 11:45 – 12:00 **Closing Remarks**

