

2012 Active Seminar Schedule

Pre-Retirement, Mid-Career, and New Employee Planning



Seminar Times

Pre-Retirement Seminars	9:00 a.m. - Noon
Mid-Career Seminars	9:30 a.m. - Noon
New Employee Seminars	9:30 a.m. - Noon
Post-Sessions	12:15 - 1:45 p.m.

Location

11th Floor | 475 14th St.
Oakland, CA 94612

How to Sign Up

Email info@acera.org (or call 510-628-3000) to sign up for a seminar, post-session, or both. Space is limited.

2012 Schedule

<u>Date</u>	<u>Seminar</u>	<u>Post-Session</u>
Jan. 10	Pre-Retirement	----
Feb. 7	Pre-Retirement	Guardianship & Conservatorship
Feb. 16	Mid-Career	----
Mar. 8	New Employee	----
Mar. 13	Pre-Retirement	Wills, Trust, & Powers of Attorney
Apr. 10	Pre-Retirement	----
May. 8	Mid-Career	Impact of Divorce
Jun. 7	Pre-Retirement	----
Aug. 7	Pre-Retirement	----
Aug. 28	New Employee	Wills, Trust, & Powers of Attorney
Sep. 6	Pre-Retirement	----
Oct. 11	Mid-Career	Impact of Divorce
Oct. 18	Pre-Retirement	----
Nov. 8	Pre-Retirement	----

New Employee Seminar

For members with less than 5 yrs. of service:

- What should I know now to plan for retirement?
- When can I retire?
- What should I expect after retirement?
- The benefits of ACERA membership.
- What if I leave employment?

Mid-Career Seminar

For members with 5 or more yrs. of service:

- Vested membership
- Reciprocal retirement agency benefits
- Service purchases
- Re-deposits
- Employment termination options

Pre-Retirement Seminar

If you plan to retire in the next 4 years:

- Retirement benefit formula
- Retirement allowance options
- Retirement application process
- Retirement benefits
- How vacation payoff affects retirement

Impact of Divorce on ACERA Benefits

- What is community property?
- How are benefits affected by community property laws?
- What to do in the event of a court order.
- What documents are required by ACERA?
- How to prevent delay of my retirement benefit payments?

Guardianship & Conservatorship

- Why would I delegate legal responsibilities of my beneficiary to another person?
- Why are each formed and what is involved in the court process?
- How to assure that my beneficiary instructions are carried out.
- Why does ACERA review court appointments of conservators or guardians?

Wills, Trust, and Powers of Attorney

- Why would I designate another person to handle my legal and business matters?
- How do I utilize a Power of Attorney?
- How do I make sure I grant my agent appropriate powers?
- What is a Power of Attorney?
- How does having a will affect ACERA death benefits?