



Financial Retirement Educational Event

Agenda of Speakers

Tuesday, October 15, 2019

8:30AM-2:00PM

- I. **Financial Bootcamp Reveille** **8:30**
Sherry Mose, Chairman of the HMEPS Board of Trustees and
Plan Administrator of the City of Houston Deferred Compensation Plan
- II. **Field Training Exercise: Testing Your Retirement IQ – Q&A** **8:35-9:10**
Steve Waas, HMEPS, Finance and Operations Manager
Gary Wilkins, Empower Retirement, Client Relationship Manager
- How much do you know about the ins and outs of retirement?
- III. **Guard Duty – City Talk** **9:15-9:45**
Mayor Sylvester Turner
- IV. **Long Range Surveillance - Strategizing Your Pension Benefits** **9:50-10:35**
Steve Waas, HMEPS, Finance and Operations Manager
Nicole Riney, HMEPS, CFP®
- Calculating your pension benefit
 - Understanding the value of a pension
 - Four things that will eat away at your savings
- V. **Digging Defensive Trenches - Internet Schemes and Scams** **10:40-11:25**
Lilly Chu, MSW, Program Coordinator, BBB Education Foundation
- Scammers' Top 10 List: Identify the most popular scams and fraud schemes of the year
- CHOW TIME (LUNCH)** **11:30-12:00**
- VI. **Logistics Training - Focusing on the Future** **12:05-12:50**
Gary Wilkins, Empower Retirement, Client Relationship Manager
- City of Houston 457(b) Plan features and benefits
 - Realities of Retirement
 - Investing Principles
- VII. **Strategic Advice - Social Security** **12:55-1:45**
Andrew Hardwick, Public Affairs Specialist, Social Security Administration
- Social Security: Understanding the Benefits
 - Medicare Enrollment Date and Part D Plans
- VIII. **After Actions Review – Closing** **1:50-2:00**
Sherry Mose, Chairman of the HMEPS Board of Trustees and
Plan Administrator of the City of Houston Deferred Compensation Plan