



Financial Retirement Educational Event

Agenda of Speakers

Friday, October 25, 2019

9:00AM-2:00PM

- I. *Financial Bootcamp Reveille* **9:00**
Sherry Mose, Chairman of the HMEPS Board of Trustees and
Plan Administrator of the City of Houston Deferred Compensation Plan
- II. *Strategic Advice - Social Security* **9:05-10:00**
Andrew Hardwick, Public Affairs Specialist, Social Security Administration
- Social Security: Understanding the Benefits
 - Medicare Enrollment Date and Part D Plans
- BREAK** **10:00-10:10**
- III. *Logistics Training - Focusing on the Future* **10:15-10:50**
Gary Wilkins, Empower Retirement, Client Relationship Manager
- City of Houston 457(b) Plan features and benefits
 - Realities of Retirement
 - Investing Principles
- IV. *Guard Duty – City Talk* **11:00-11:30**
Mayor Sylvester Turner
- CHOW TIME (LUNCH)** **11:30-12:00**
- V. *Long Range Surveillance - Strategizing Your Pension Benefits* **12:00-12:45**
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
- VI. *Digging Defensive Trenches - Internet Schemes and Scams* **12:50-1:35**
Lilly Chu, MSW, Program Coordinator, BBB Education Foundation
- Scammers' Top 10 List: Identify the most popular scams and fraud schemes of the year
- VII. *After Actions Review – Closing* **1:35-1:45**
Sherry Mose, Chairman of the HMEPS Board of Trustees and
Plan Administrator of the City of Houston Deferred Compensation Plan