NRECA Retirement Seminar

OCTOBER 28–29 • TEC GEORGETOWN TRAINING FACILITY

Register by September 30

This program is designed to help later-career employees get ready to retire successfully. We’ll explore investing and risk-management principles, NRECA retirement plan benefits and distribution options, Social Security benefits, estate planning concepts and developing an income strategy in retirement. For employees age 50 and above and spouse attendance is encouraged.

To register online, go to texas-ec.org.
NRECA RETIREMENT SEMINAR
October 28–29 • TEC Georgetown Training Facility, 100 Cooperative Way, Georgetown

COURSE INFORMATION

Course Description: This program is a comprehensive retirement planning seminar custom designed to meet the needs of NRECA’s member systems and employees. The course helps participants plan for their retirement.

Participants learn to:
• Understand investments
• Learn about NRECA retirement benefits
• Identify financial products and services
• Learn to manage and protect resources
• Understand the taxation of retirement benefit withdrawals
• Estimate future expenses and retirement income needs
• Calculate additional savings needed to meet retirement goals
• Anticipate needs for long-term care, health insurance and estate planning
• Develop a retirement investment strategy
• Assume control of planning for retirement

Instructor: NRECA’s experienced investment advisors, field services representatives and local Social Security and estate planning professionals.

Please note: Participants in the NRECA RS Plan are asked to have an estimate/projection in hand. If participant doesn’t have a projection, please contact mbeavers@texas-ec.org to make arrangements to obtain an estimate.

COURSE OUTLINE

October 28
8:45 a.m. Registration
9:00 a.m. Welcome and Introductions
9:15 a.m. Benefits and Assets
10:15 a.m. Break
10:30 a.m. Benefits & Assets (continued)
Noon Lunch
1:00 p.m. Retirement Risks
1:30 p.m. Retirement Expenses/Healthcare
2:30 p.m. Break
2:45 p.m. Your Retirement Paycheck
3:45 p.m. Review and Worksheet
4:15 p.m. Adjourn

October 29
9:00 a.m. Protecting your Assets
9:30 a.m. Break
9:45 a.m. Legal Affairs and Estate Planning
11:00 a.m. Break
11:15 a.m. Creating Your Game Plan
11:45 a.m. Resources
Noon Evaluations and Adjourn
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REGISTRATION FORM

Register by September 30. Click here to register online.

Please print clearly.
One registration form per attendee. Duplicate as necessary.

Name

Badge Name

Title

Cooperative

Address

City

State

ZIP

Phone

Email

Registration Fees (all include lunch)

☐ Member Registration $50 per person

☐ Spouse Registration $50 per person

Cancellation Policy: All changes or cancellations must be made in writing via email to brobertson@texas-ec.org. A full refund will be issued if cancellation is received by September 30. After that date, no refunds will be issued. In the event you cannot attend, you may send a substitute.

Signature

Register online or email completed form to brobertson@texas-ec.org.

Questions: Brooke Robertson, (512) 486-6212 or brobertson@texas-ec.org

Training Location: TEC Georgetown Training Facility
100 Cooperative Way, Georgetown 78626, (512) 868-8610 or 1-877-868-8610

Suggested Places To Stay: Attendees are responsible for making their own hotel room reservations.

Holiday Inn
2370 Chisholm Trail
Round Rock 78681
(512) 246-7000
$89, includes hot breakfast

Hilton Garden Inn Round Rock
2310 North Interstate Hwy 35
Round Rock 78681
(512) 341-8200
$121, includes hot breakfast

Courtyard Austin Round Rock
2700 Hoppe Trail
Round Rock 78681
(512) 244-1457
$103; Use code X58

Hampton Inn & Suites Georgetown
160 River Oaks Cove
Georgetown 78628
(512) 688-5300
$119, includes hot breakfast