"Healthy, Wealthy and Wise*" Lunchtime Presentations, Spring 2015

The theme of the series is how to keep fit; financially, mentally and physically. There will be one presentation every week from March 02 through May 26, brought to you by the Human Resources Benefits Department. Take a look at the schedule; come to as many as you wish, no need to register. Just bring your lunch and your questions.

Smith Memorial Student Union (SMSU) is on Broadway and Harrison.

<table>
<thead>
<tr>
<th>Date, Time and Place</th>
<th>Presentation Title</th>
<th>Topics Include</th>
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| Monday 3/2 12:00-1:00 | **Social Security and Medicare**  
**Alan Edwards** | **Social Security and Medicare** |
| SMSU 236             |                    |  
Alan Edwards a Public Affairs Specialist with the Social Security Administration (SSA) has worked more than 15 years as a bilingual claims representative and brings extensive experience with the SSA's many programs. |
|                      | Please come early  |
|                      | room holds 77 occupants. |
| Wednesday 3/18 | Fiscal Fitness 101  
David Jackson, CLTC  
David is a financial professional dedicated to helping individuals, families and businesses build their financial futures. Growing up in a family business, he gained many insights that complemented his education in Business Finance from Oregon State University. Please come early room holds 77 occupants. | Fiscal Fitness 101  
Building a solid financial future through the process of proper financial planning  
- Overcoming financial roadblocks  
- Cultivating daily habits  
- Creating a financial blueprint |
| Thursday 4/09 | TIAA-CREF  
Tomorrow in Focus: Saving for your ideal retirement  
Andrew Martinez, CFP  
Andrew Martinez is a Field Consultant in the Institutional Business division at TIAA-CREF, a Fortune 100 financial services organization and leading provider of asset management and retirement services for non-profit institutions. He has been working in this industry for the past 10 years. Please come early room holds 77 occupants. | TIAA-CREF  
- Understand the real benefit of time in regard to saving  
- Learn the essential features of retirement investments  
- Gain the confidence you need to create or modify your own retirement plan |
| Monday 4/13 | Social Security and Medicare  
Alan Edwards  
Alan Edwards a Public Affairs Specialist with the Social Security Administration (SSA) has worked more than 15 years as a bilingual claims representative and brings extensive experience with the SSA’s many programs. Please come early room holds 80 occupants. | Social Security and Medicare  
- Today’s recipients – Importance & Pressures  
- Future & concerns for Change  
- Your entitlement and payment amount  
- Taxes & earnings limits  
- Benefits for family members |
| Wednesday 4/29 12:00-1:00 SMSU 236 | **Buying and Selling Real Estate**  
*Harlan Mayer and Julee Felsman*  
Harlen Mayer, Principal Broker is a Portland real estate expert, specializing in residential commercial and investment properties. He is a Certified Residential Specialist (CRS) and a Certified Negotiation Expert.  
Julee Felsman is a Sr. Loan Consultant. Over the last 20 years she has assisted thousands of clients, from first-time home buyers to seasoned real estate investors, navigate the mortgage process and make sound financial decisions.  
Please come early room holds 77 occupants. |
|-------------------|----------------------------------|
| **Buying and Selling Real Estate**  
Buying? Selling? A guide on where to start  
Join us for another interactive how-to workshop in the “HHW” seminar series, focusing on the home buying and selling process, including a run-down on today’s real estate market: where the high and low markets are headed, and what it means for you. |
| Thursday 5/7 12:00-1:30 SMSU 236 | **PERS OVERVIEW**  
The presentation will be done by a member of the PERS Retirement Education Team.  
Please come early room holds 77 occupants. |
| --- | **The Overview Presentation**  
Provides details regarding PERS Tier 1/Tier 2, OPSRP, and the IAP. Topics include how to know which program you are in, the IAP, benefit calculations, Online Member Services, and member resources as well as many other topics. |
### Wednesday 5/13
12:00-1:00
SMSU 296/8

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<thead>
<tr>
<th>Estate Planning</th>
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<tr>
<td>Katherine VanZanten</td>
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Katherine VanZanten is an accomplished estate planning and real estate attorney and partner in a prominent Portland firm.

Please come early room holds 77 occupants.

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### Tues. 5/26
12:00-1:30
SMSU 238

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<th>PERS OVERVIEW</th>
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The presentation will be done by a member of the PERS Retirement Education Team.

Please come early room holds 80 occupants.

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### Estate Planning

Planning and preparing for the management and eventual transfer of your wealth is an essential step to achieving peace of mind and gaining financial freedom. Discover what you need to know to protect yourself and your loved ones!

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*The title takes its name from the Benjamin Franklin proverb “Early to bed, early to rise makes a man healthy, wealthy and wise” which was from his Poor Richard’s Almanac.*