



# "Preparing to Retire"

Be sure to register below!

## AGENDA

**Brought to you by the UPI Retirees Chapter**

Join us for one of the following webinars focused on preparing for retirement!  
There will be 2 separate sessions: One for those in RSP and one for those in Defined Benefits.

**October 9, 2024, 10:00 AM - Only for those in Defined Benefit** (*guaranteed*)

**October 10, 2024, 10:00 AM - Only for those in RSP** (*self-managed*)

Zoom Meeting – An automatic email will be sent to you after you register with the link to the webinar.

### October 9<sup>th</sup> --Defined Benefit Session Agenda:

Register: <https://us02web.zoom.us/j/83282862171?pwd=GTWYbudFCW25KELkNtOm1yMk9xfhFP.1>

- Elizabeth Essex, UPI Retirees Chapter President. Welcome
- Marlys Johnson, SURS Retirement Consultant, [mjohnson@surs.org](mailto:mjohnson@surs.org)  
Stacy Smith, SURS Senior Education Manager, [ssmith@surs.org](mailto:ssmith@surs.org) 1-217-378-8800; Lori Kern, Retirement Counseling Manager
- Sandi Estep Health insurance. [Estep2001@comcast.net](mailto:Estep2001@comcast.net)
- Steven Rock, Retirees Chapter Secretary-Treasurer and SURS trustee [mfsmr2@gmail.com](mailto:mfsmr2@gmail.com)
- Q & A
- John Miller, UPI 4100 President. Closing

### October 10<sup>th</sup> -- RSP Session Agenda:

Register: <https://us02web.zoom.us/j/86504503595?pwd=EjAbb8afjenuRfizX8xVYfkjwrMoMA.1>

- Elizabeth Essex, UPI Retirees Chapter President. Welcome
- Keith Johnson, RSP SURS Director & Retirement Consultant [KJohnson@surs.org](mailto:KJohnson@surs.org)
- Rohin Ullberg, CLU, ChFC, CWS- Heartland Investment [rullberg@ifgrr.com](mailto:rullberg@ifgrr.com) or [jim@rohinullberg.com](mailto:jim@rohinullberg.com) 708.922.0505
- Sandi Estep To withdraw your money or not, health insurance. [Estep2001@comcast.net](mailto:Estep2001@comcast.net)
- Steven Rock, Retirees Chapter Secretary-Treasurer and SURS trustee [mfsmr2@gmail.com](mailto:mfsmr2@gmail.com)
- Q & A
- John Miller, UPI 4100 President. Closing

**If you are not sure which retirement plan you are in, go to SURS at <https://surs.org>**