



United Labor Credit Union



RBC Wealth Management



Healthy results. Guaranteed.

Reaves Law Firm, P.C.

KANSAS CITY

6th annual Union Retiree Financial Forum Hosted by United Labor Credit Union

Thursday, March 20, 2014

7:45 a.m. registration – 3:30 p.m.

6320 Manchester Ave., Gladden Hall/Visions Building
Kansas City, Mo. 64133



**REGISTER for FREE at
www.UnitedLaborCU.org
Or call (816) 313-2848**



Emcee Terry DaVolt, internationally acclaimed comedian & hypnotist
Financial Experts ♦ Breakfast & Lunch Included
Special performance by Band Students ♦ Door Prizes ♦ No Sales Pitches!





6th annual Union Retiree Financial Forum



Hosted by United Labor Credit Union – March 20, 2014

8 a.m. – 3 p.m. – 6320 Manchester Ave., Visions Building/Gladden Hall, KCMO

- 7:45 a.m. – Doors Open **Registration & Breakfast**
- **8:15 a.m. – Welcome and Introductions**, Erin Williams, Vice President, Marketing Business Development, United Labor Credit Union
- **8:30 a.m. – “How the Affordable Care Act Impacts You as a Patient,”** Christa Smith, Vice President Business Development, Advanced Patient Advocacy
- **9:30 a.m. – “Planning Your Estate to Avoid Pitfalls, Probate and Problems,”** Craig Reaves, CELA, President, Reaves Law Firm, PC
- **10:30 a.m. – “Don’t Outlive Your Money!”** Robert Burks, Senior Vice President, RBC Wealth Management; **“Addressing Your Debt in Retirement,”** Tim Vogler, President, United Labor Credit Union
- **11:30 a.m. – “Social Security Fundamentals: Guidelines for Making Well-Informed Decisions”** Jeffrey Gentle, CFA, Client Portfolio Strategist, Product Management and Development Group, Ivy Funds
- **12:15 Lunch** – Mini-presentations from Walter Smith, **Building Trades National Medical Screening Program**; and Walt Ingram, **Union Sportsmen’s Alliance**; Catered by HyVee
- **12:30 p.m. – “Turning History Into Opportunity,”** Chris Staniforth, Regional Vice President/Regional Broker Dealer Division, Invesco
- **1:30 p.m. – “How Will Healthcare Costs Affect Your Retirement (and Estimating Healthcare Costs in Retirement),”** Kevin Tessmer, Nationwide
- **2:30 p.m. – Event wrap-up, prize drawings and entertainment by Terry DaVolt**