NPEA options
Fall | 2013
NATIONAL PENSION EDUCATION ASSOCIATION

Message from President, Aimee Rives

The Countdown to Charleston 2013 Has Begun

Returning to Charleston marks 26 years since our 1987 conference there and a homecoming to the state where NPEA was incorporated as the National Preretirement Education Association in 1980. In 2006, we changed our name to the National Pension Education Association, broadening the focus to provide programs not only for those closest to retirement, but for all of our members at each stage of their careers.

Over the last 30 years, membership has grown as our annual conferences crisscrossed the country introducing NPEA and its mission to a wide range of state and municipal pension funds. Conference agendas have reflected economic and legislative trends and current issues facing our industry.

This year's agenda continues the tradition of providing valuable information and the most creative methods to communicate those ideas to our diverse memberships . You can see previews of this year's speakers online at www.npea.com and on Facebook. The complete agenda and helpful conference hints are on pages 2-3.

In board news, Judy Utley retired on July 1, and is enjoying her new life on the Gulf Shores of Mississippi. We will miss the energy, experience, and enthusiasm she brought to NPEA and the board. We thank her for her many contributions and wish her a long and happy retirement. (*See Judy's farewell letter on page 5.*)

Whether you are a regular attendee or first-timer, you become be an important part of the NPEA family. We stay connected and are readily available to offer assistance and support whenever needed. We joked in Boston last year that we are the "Cheers" of associations because at our conferences everybody knows your name. So plan to come to Charleston and have a wonderful experience.

What's Inside:

2 *You Don't Want to Miss Charleston*
3 2013 Annual Conference Agenda
4 Feature Article:
Eyewitness to the Evolution
5 *NPEA Bids Farewell to Judy Price Utley*
6 Contact Us

NPEA Heading West in 2014
Portland, Oregon | October 25-29, 2014

You Don't Want to Miss Charleston

The 2013 Annual Conference promises something for everyone

"What is it about the Charleston area - the salt breezes, the garden gates of swirling iron, the vivid pastel homes along Rainbow Row? Whatever it is, this Southern gem beguiles guests, luring them with her historic charm. And we guarantee you can't get enough."

Southwest Airlines *Spirit* magazine

If you miss this year's conference in Charleston, South Carolina, you are missing the chance to meet colleagues from all parts of the country and to get the most updated information about public pensions and retirement planning in one of the most highly rated destinations in the world. We've borrowed the South Carolina state motto, ***Prepared in Mind and Resources***, for the conference theme symbolizing when we return home we will be better prepared to be the best we can be for our members.

Helpful hints:

The Mills House Wyndham Grand Hotel
"The hotel combines old Southern charm and the latest in modern amenities."
Conde Nast Traveler's magazine *Gold List of the World's 700 Best Places to Stay*

Weather
November is one of the best times of the year to visit the city. The average rainfall of 2.49 inches is the lowest month of the year and the temperature is mild with the average high in the low 70's and the low in the mid 50's.

What to wear
Appropriate dress is business casual and be sure to pack comfortable walking shoes. The hotel is located in the center of the city and within walking distance of historical sites, museums and other attractions.

How to get there
You will fly into Charleston International Airport (CHA), which is a 30-minute ride to/from the hotel. A cab ride is approximately $35 one way. Note that conference registration is 2-4 pm on Saturday, November 2.

November 5 is Election Day
Although it is not a federal election year, if you plan to vote in your state or local elections, don't forget to find out your local requirements for absentee or early voting.

Nine Things We Love About Charleston, SC

By George Hobica
Syndicated travel journalist and founder of Airfarewatchdog.com

www.huffingtonpost.com/george-hobica/ten-things-we-love-about-charleston_b_1662618.html

PLEASE JOIN US!

33rd Annual NPEA Conference

November 2–6, 2013, The Mills House Hotel, Charleston, South Carolina

Saturday, November 2

2–4 pm	**Registration**
4–5 pm	**Has Retirement Planning *Really* Changed, or Have We?** *Rebecca Frasher, Assistant Director of Member Education, State Teachers' Retirement System of Ohio*
5:30–7:30 pm	**Welcome Reception**

Sunday, November 3

7 am	**NPEA-a-thon** *Optional run or walk*
8 am–4 pm	**Vendor exhibits**
8–9 am	**Registration**
9 am–noon	**Using Stories and Real Life Examples to Motivate Your Listeners** *Joseph Tabers, CSP, President, Productive Training Services, Inc.*
4:30–5:30 pm	**Speed Networking**
5:30–9 pm	Dinner (provided)

Monday, November 4

8 am–4 pm	**Vendor exhibits**
7:30–8:15 am	Breakfast (provided)
8:15–8:30 am	**President's Welcome** *Aimee Rives, Education Services Coordinator, Kentucky Retirement Systems*
8:30–10 am	**Retirement Isn't Just for Your Parents** *Zac Bissonnette, best-selling author and financial writer*
10:15–11:45 am	**Is There an App for That?** *Mark McChesney, Information Security Officer, Kentucky Retirement Systems*
11:45 am–1 pm	Lunch (provided)
1–2 pm	**Using Today's Media to Effectively Reach Members and Other Stakeholders** *Ady Dewey, consultant to NASRA and PensionDialog*
2:15–4:45 pm	**Strategic Creative Communication** *Cindy and Steve Crescenzo, Crescenzo Communications*
	Dinner on your own

Tuesday, November 5

8 am–4 pm	**Vendor exhibits**
7:30–8:15 am	Breakfast (provided)
8:15–8:30 am	**NPEA Annual Business Meeting**
8:30–9:30 am	**Pension Legal Briefs** *Robert Klausner, Esq., Klausner and Kaufman, P.A.*
9:45–11:15 am	**Writing Across All Media** *Steve Crescenzo, Crescenzo Communications*
11:15 am–noon	**Washington Update** *Tom Lussier, President, Lussier, Gregor, Vienna & Associates*
Noon–1 pm	Lunch (provided)
1–4 pm	**Concurrent Breakout Sessions** ■ **Disaster Recovery: How Prepared Are You?** *Nicole Hamler, Executive Advisor & Business Continuity Coordinator, PSRS of Missouri* ■ **Social Media: Making the Case with Your Leadership** *Meghan Lightle, Communications Director, South Carolina Public Employee Benefit Authority* ■ **Technology Roundtable: What's Working, What's Not?** *NPEA member systems* ■ **Pension Investing 101** *Presenter to be named*
6 pm	Dinner (provided)

Wednesday, November 6
Departure day

Registration available online at **npea.com**

- **Conference fees**
  Attendee regular fee $695
  Guest fee $325
  Vendor fee $1,500
- **Hotel reservation info**
  Room rate $205
  Reserve online at npea.com or by calling the hotel directly at 877-999-3223 and stating that you are with the NPEA group. To guarantee a room at the conference room rate of $205, you must make your reservation by October 2, 2013.
- **Transportation**
  Fly into Charleston International Airport (CHS). The hotel is a 30-minute ride from the airport, and cabs are approximately $35 each way.

Who should attend

- Retirement counselors and benefit analysts
- Trainers and program developers
- Member services managers
- Member education staff
- Communications staff
- Retirement counselors requiring CRC continuing education credits
- System directors and executives looking to create, improve or expand member education initiatives

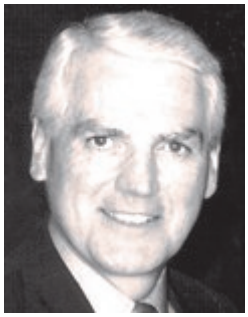
NPEA
National Pension Education Association

NPEA options
NATIONAL PENSION EDUCATION ASSOCIATION

Eyewitness to the Evolution

Looking Back on 33 Years of NPEA

By David Daly, NPEA Administrator and Unofficial Historian



Every fall, I look forward to three things: the World Series, leaf watching here in the great Northeast and, for the last 26 years, the annual NPEA conference. I got my first exposure to the National Preretirement Education Association (as it was then-named) when I became the Coordinator of Preretirement Planning at the New York State Teachers' Retirement System (NYSTRS) in 1987. NYSTRS was one of the founding members of NPEA in 1980, when it joined several other public pension systems that recognized the need to assist the nation's public employees plan for retirement. Until that time, retirement systems were providing information to their members only about their retirement system benefits and the decisions they had to make about those benefits prior to retirement.

After consulting with our members over the years, it was becoming increasingly apparent they needed more information than we were providing to make the right retirement decisions. That new framework would include many other issues to consider, namely estate and financial planning, Social Security benefits, taxes, housing choices, relationship changes and the psychological adjustment to retirement. Employers and unions didn't have the resources to take on the task. NPEA was created to fill that void. Its mission would be to promote the development of programs and services by public pension systems to make their members aware of these other considerations and encourage them to seek professional advice where necessary to make informed decisions.

Returning to Charleston this year is special for me because it was here in 1987 at my first conference where I experienced the true value of NPEA. I was introduced to presentations and other retirement professionals who were all part of this growing retirement education movement. Believe it or not, some are still involved in NPEA, while others continue in the industry in other capacities. Over the years, the relationships and friendships that developed have played an important role in helping us achieve our professional and personal goals. In a borrowing industry, we have shared ideas and materials and have been there for each other to celebrate successes and offer support in difficult times.

Since 1987, I have attended conferences on both coasts and many cities in between. Agendas have reflected economic and legislative trends and changes. Topics address the most current pension issues and the latest communications tools to reach our diverse audiences. I remember when computer benefit estimates and video conferencing were hot technology topics and we were trying to determine if the Internet would play a role in what we do in the future. We have discussed the trend to retire early during the good times of the '90s, and the trend today of

Evolution (continued on p. 6)

Heading to the Great Northwest in 2014

Portland, Oregon | October 25-29, 2014

We're heading back to the West Coast in 2014. Final arrangements have been made for our 34th annual conference to be held in Portland, Oregon at the historic Benson Hotel October 25-29.

Portland has been voted a "Top Travel Destination" by *Frommer's Travel Guides,* one of only 12 destinations in the world. The Benson Hotel, located in the best part of a vibrant downtown, celebrated its 100th anniversary in 2012 and has welcomed every President since William Howard Taft, as well many world leaders and celebrities.

So mark your calendars and plan to join us next year as we travel from coast to coast for what will be another wonderful NPEA conference.

NPEA bids farewell to Judy Price Utley

Enjoy Retirement, Judy! We will miss you.

Dear NPEA Membership / Family:

I have been involved with this organization since 1997 when I attended my first conference in Baltimore, MD. I was so inspired by that experience that I wanted to be as active with NPEA as possible.

The benefits I have reaped during this time are immeasurable. Through my involvement with NPEA, I have gained extensive knowledge and tips to assist me with my job, as well as met numerous members who have always been willing to answer my questions and give suggestions when I needed them. Even though we come from all over the USA, we face many of the same problems in the public pension arena.

Being a part of the "NPEA Family" has been one of the highlights of my professional life. It was my honor and pleasure to serve on the NPEA Board of Directors for several years and an extreme honor to serve as your NPEA President for two years. Thanks to all of you for allowing me to have that honor to serve in that capacity.

The organization has meant much to me. I have grown so fond of seeing you guys at the annual conferences and spending invaluable time with you. However, as the old adage goes, all good things must come to an end, and so it is with my association with NPEA.

As of June 1, 2013, I am officially retired from the Retirement Systems of Alabama. This came really quickly, but the beach is calling! Now I will be able to practice firsthand all of those lessons we have been teaching for so many years. Please know I will miss NPEA and all of you who have become so special and close to me. It truly is like leaving a family behind.

Best of luck to you all and I encourage each of you to stay involved with NPEA. It will be a rewarding journey for you. *Some of you who grew closes to me during the past few years would be sorely disappointed if I left without one last thing – ROLL TIDE!*

Judy Price Utley

Join us on Facebook at
www.facebook.com/NationalPension

Evolution (continued from page 4)

working longer following the recession in 2008. More recently, we have given much attention to protecting public pensions from attacks on all levels.

We have been welcomed by local dignitaries, as well as motivated, energized and informed by authors, actuaries, academics, economists, government leaders, futurists, legislators, researchers, legal experts, and communication specialists. Systems have used conferences to exhibit their own unique programs and services. Conference themes helped us "team up" in Baltimore, "survive" in San Diego, and solve "mission impossible" in Tempe.

We have networked and gotten to know each other at offsite venues and activities, including boat rides, trolley tours, and visits to museums and historical sites. We learned line dancing in Lincoln, witnessed a reenactment at Fort Jackson in Georgia, and were in Washington, DC for the historical presidential election of 2000. We've had a "colorful" past as we saw the white sand of Destin, the Red Rocks in Colorado, bluegrass of Kentucky, and the "green flash" in Naples. All the while, taking advantage of the opportunities to share information and return home each year better equipped to serve our members.

In the early days, our efforts were concentrated on getting the first wave of Baby Boomers ready for retirement. We knew the benefits of planning earlier and getting the information out to our younger members earlier, so we began to expand our programs to help them plan at the beginning and middle of their careers. Consistent with that broader emphasis, we changed our name to the National Pension Education Association – same acronym, but now with an expanded focus to include all our members.

All this was made possible by dedicated board members who bring unique skills and experiences in helping the organization continue to grow and be a force in the pension industry. I am privileged and honored to have been involved for so many years as a participant, board member, and in my current position as Administrator. I have been enriched in so many ways – professionally and personally – by my association with NPEA, and I look forward to returning to Charleston in November to commemorate the beginning of my NPEA experience.

NPEA Board of Directors

Aimee L. Rives, President
Kentucky Retirement Systems
Educational Services Coordinator
aimee.rives@kyret.ky.gov
(502) 696-8578

Erika M. Glaster, President-Elect
Massachusetts Teachers' Retirement System
Deputy Executive Director
erika.glaster@trb.state.ma.us
(617) 679-6877

Dearld Snider, Treasurer
Public School and Education Employee Retirement Systems of Missouri
Assistant Executive Director of Operations
DSnider@psrsmo.org
(800) 392-6848 ext. 1041

Jane Suhr, Secretary
Minnesota Teachers Retirement Association
Senior Retirement Services Specialist
JSuhr@minnesotatra.org
(800) 657-3669

Patrick W. Lane, Board Member
Oklahoma Public Employees Retirement System
Communications Director
plane@opers.ok.gov
(405) 858-6720

Terrence F. O'Connor, Board Member
Texas County & District Retirement System
Director of Member Services
Terry@tcdrs.org
(512) 637-3254

David T. Daly, Administrator
Clifton Park, New York
dave.daly@npea.com
(518) 461-5614