

# **Training Alert!**

## **PREPARING FOR RETIREMENT**

**This class is designed for City of Seattle employees who are planning to retire within the next 5 years.**

**In this class, you will learn:**

- ◆ What to expect from City Retirement System, Social Security, Medicare, Medicaid.
- ◆ Strategies to enhance your financial security through financial planning.
- ◆ Factors to consider in estate planning.

### **Target Audience**

This course is for City of Seattle employees who are approaching retirement and are members of the Seattle City Employees' Retirement System and their spouses/partners.

### **Instructors**

The instructors are specialists in the field of retirement including:

<b>Financial Planning</b>	<b>Estate Planning</b>
<b>City Retirement System Specialists</b>	<b>Social Security</b>
<b>Statewide Health Insurance Benefits (SHIBA)</b>	

### **Class Dates and Time**

**Class takes place downtown in the Retirement Office, on the 10<sup>th</sup> Floor of the Pacific Building, 720 Third Avenue. Different topics are covered in each of the classes, which are held in the evening for four consecutive weeks as follows:**

<b>Thursday evening: May 1, 2008</b>	<b>Thursday evening: May 15, 2008</b>
<b>Thursday evening: May 8, 2008</b>	<b>Thursday evening: May 22, 2008</b>

Space is limited. **Pre-registration is required.**

**Priority is given from the waiting list based on your projected date of retirement.**

Places in the class will be allocated, and confirmation letters distributed approximately 4 weeks before each program begins.

For further information, call **Sheila Moss** at **(206) 386-1293**

**To sign up for the class**, complete the application form and return it to:

**Sheila Moss, Retirement Office**  
**Mail Stop PB-10-01**  
720 – 3<sup>rd</sup> Ave, #1000, Seattle, WA 98104.

ADA/Reasonable accommodation is provided upon request.

## Application for “Preparing for Retirement Seminars”

<b>Evening Classes</b>
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City Retirement Benefits	Social Security Benefits	Statewide Health Insurance Benefits Advisor (SHIBA)	Financial Planning & Investing
<b>Thursday May 1, 2008</b>	<b>Thursday May 8, 2008</b>	<b>Thursday May 15, 2008</b>	<b>Thursday May 22, 2008</b>
<b>6:15 – 8:15 p.m.</b>	<b>6:15 – 8:15 p.m.</b>	<b>6:15 – 8:00 p.m.</b>	<b>6:15 – 7:30 p.m.</b>
<input type="checkbox"/> Yourself <input type="checkbox"/> Yourself & spouse/partner	<input type="checkbox"/> Yourself <input type="checkbox"/> Yourself & spouse/partner	<input type="checkbox"/> Yourself <input type="checkbox"/> Yourself & spouse/partner	<input type="checkbox"/> Yourself <input type="checkbox"/> Yourself & Spouse/partner

Please request a Retirement Estimate from our office before submitting this application to the Retirement Office. Retirement estimates may take several weeks to complete depending upon our backlog and the complexity of your work history. Alternatively, the Retirement Benefit Calculator is online at: [www.cityofseattle.net/retirement/calculators.htm](http://www.cityofseattle.net/retirement/calculators.htm) or [www.seattle.gov/retirement/calculators.htm](http://www.seattle.gov/retirement/calculators.htm) if you wish to prepare an estimate yourself. We have limited the preparation of retirement estimates to those that are planning to retire within 3 years. If your planned retirement date is more that 3 years away, you will be able to use the online calculator that is linked above. **Please bring a copy of the Retirement Estimate with you to the first seminar.**

To register for the class, please complete and return this form to the Retirement Office. Class sizes are limited. Class placement will be confirmed approximately 4 – 6 weeks prior to each class session. Those closest to retirement will be given priority. **Please do not presume placement in the requested program until you receive confirmation.**

You will be notified whether your application has been approved or postponed, via the U.S. mail, as well as by email. **Only the applicants that have been approved will be granted access to the seminars.** We will keep a waiting list with the names of those who were not accepted and will attempt to place them into a subsequent seminar series, prioritizing those closest to retirement.

This program is funded by the Retirement System. There is no admission charge.

We recommend that you also consider attending one of the Deferred Compensation seminars put on by the Plan Administrator. Those sessions will be announced on the City Inweb Home Page.

Thank you for your interest in the Preparing for Retirement Seminars.

Name \_\_\_\_\_ Employee # \_\_\_\_\_ Phone \_\_\_\_\_

Email \_\_\_\_\_

Birth Date \_\_\_\_\_ Projected Retire Date \_\_\_\_\_ Estimated Retirement Service Credit (years) \_\_\_\_\_

**Return completed form to:** Seattle City Employees’ Retirement System  
 720 Third Avenue, Suite 1000  
 Seattle, WA 98104  
 or MS: PB-10-01

**For information please call Sheila Moss at:** (206) 386-1293

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