

Siemens Westinghouse Retirees Association Inc.

Quarterly Membership Meeting

October 10, 2017

- Welcome New Members
- Guest Speaker – *Harvey Grassian*
- Door Prize Drawing
- Coffee Break
- Treasurer's & Membership Report
- Social Committee Activities
- Financial Committee Activities
- Board Elections
- Special Topics
- Open Discussion
- Adjourn



New Members (since July meeting)

The Association is pleased to welcome the following new members:

James Dorow - Orlando

Salvatore Simonetti – Orlando

Deborah Cutter – Winter Park

Guest Speaker – Harvey Grassian

- Excellent volunteer opportunity for SWRA members in the AARP Foundation Tax-Aide Program
- Harv retired Jan 1 2009 after nearly 40 years in sales, marketing, projects, strategy, planning, business excellence and customer satisfaction in Minneapolis, Chicago, Lester and Orlando, most of it in the steam service business
- After a failed attempt to participate in the 2010 Census effort, he stumbled on the Tax-Aide program and began volunteering in January 2011
- He has come here looking to recruit SWRA members - have the perfect skill set to contribute to the program.

SWRA Door Prize Drawing

Win a Home Depot Gift Certificate

- Go to coffee/donuts table
- Fill out entry form
- Drop it in the bucket

Coffee Break



Treasurer & Membership Report

Current Bank account balance - \$7,399.28

This balance includes dues that have been paid in advance by members for future years. This amount is as follows:

For 2018 \$990.00

For 2019 \$180.00

For 2020 \$ 15.00

Total paid in advance: \$1185.00

- Year – to – Date Total Deposits - \$4,065.00
- Year – to – Date – Total Payments - \$2,696.42

Membership & Dues

- Total members – 250
- Died – 2
- Suspended - 13
- New – 3

Treasurer & Membership Report

Signed Waivers Received – 154 (62% of the membership)

If you have not submitted your signed membership application with liability waiver please do so as soon as possible. Make sure to initial the liability waiver paragraph as indicated.

Dues payment and liability waiver forms can also be mailed to:

Paul McCauley

1948 Houndslake Drive

Winter Park FL 32792-6035

Also, please notify me at mccpauley@aol.com of any changes to your email or postal mailing address so that we can maintain an accurate membership directory and keep you informed of Association activities.

If you know of a retiree who is not a member of the Association, encourage them to join. Membership forms can be downloaded from the website at:

www.SiemensWestinghouseRetirees.org

You can also contact me for a form or to answer any membership questions.

Social Committee Activities

Past Events

July 22 – Fantasy Of Flight

July 31 – Upcoming Events at UCF Theatre, Wayne Densch Theatre and St. Luke's Concert Series

September 16 – Brass Band of Central Florida, St. Luke's

September 28 – Casual Dinner at Oyishi Japanese Steakhouse

Social Committee – Planned Events

October 12 - Estate Planning & Changes to Medicare for 2018

October 21 – SWRA Fall Picnic

October 25 – Edward Jones – A Basic Short Course on the Fundamentals of Retirement Investing

October 27 – Wind Turbine Training Center Tour

November 9 – St. Augustine Bus Ride & Lunch

December 4 – Florida Catholic Charities Performance featuring Maureen McGovern

December 12 – Disney Springs Bus Ride & Dinner

Estate Planning / Medicare Seminar

- ESTATE PLANNING – PEGGY HOYT, ELDER LAW ATTORNEY
 - Wills, Trusts, Power of Attorney, Probate, Directives, Transition
 - Q/A --- Your Opportunity
- MEDICARE – JOE SANTIAGO, BENEFITS CONSULTANT
 - Changes of 2018
 - Q/A
- WHEN:
 - Place – One Senior Place – 715 Douglas Ave, Altamonte Springs
 - Date: Thursday Oct 12, 2017
 - Time: 9:00 AM – Noon
 - Box Lunch
- SIGN UP -- NOW !!!

ESTATE PLANNING QUESTIONS

1. When is setting up a trust appropriate
2. Are there different types of Estate Planning Trusts and how does one choose
3. What assets should go into a trust and what should be left out
4. What happens if the named executor cannot perform
5. What are the actions that an executor is legally bound to perform
6. What happens if the executor fails to perform
7. Who monitors the actions of the executor
8. Can anyone be named as a beneficiary
9. What happens if a beneficiary refuses a bequest or is incapacitated
10. How often should beneficiaries be revised
11. What is the best way for grandparents to provide for grandchildren in a trust
12. How does one transfer collectibles to specific heirs
13. What is the jurisdiction when you have property in other states
14. What is the estate tax exposure in Florida and can it be mitigated
15. Can the estate plan have assets go to the spouse and then require certain assets pass to specific heirs at that spouse's death
16. Where does an executor go for help in administering an estate
17. How frequently do you need to update an estate plan
18. Who must be advised if and when an estate plan is updated
19. How can one's wishes be implemented if dementia occurs
20. Can end of life issues be spelled out in the estate plan

Basic Investment Seminar

- Edward Jones Investing Services / SWRA
 - Very short course on investing fundamentals
 - Target Audience is “Spouses” – but open to all
 - Oct 25, 2017
 - 11:30 to 1:00
 - Steffano’s Trattoria (shopping plaza at Red Bug/Tuskawilla)
- What I need to know if I suddenly am responsible for retirement
- How to invest
- What is my risk level and how do I handle this
- How to create a diversified portfolio
- How to get help
- Q/A

Board Elections

Current Board & Committee Membership

Jim Steinmetz	President
Leslie Dawson	Vice-President
John Blake	Secretary & Member Recruitment
Paul McCauley	Treasurer
Ron Artinger	Social Committee Chair
George Baker	Financial Committee Chair
Bill McCown	1 st Term
Paul Minard	1 st Term

Supporting Members

Dave Berrong – Former President, General Support

Pete Derosa – Former President, General Support, Facebook Management

Andy Ayoob – Former Vice-President, General Support, Website Management

Dick Hood – Former Treasurer, General Support

Joe Yarusinski - Newsletter

Ish Aneja – Casual Dinner Lead

Board Elections

- **Board Members 2-Year Term Expiring:**

- James Steinmetz

- George Baker (reached limit of Board Membership)

- Ron Artinger

- John Blake

- **Nominated For Election to the Board (Total of 5 can be elected) :**

- James Steinmetz

- Ron Artinger

- John Blake

- Lee Vickers

- ??????

Special Topics

Support your SWRA!

- We really could use someone to manage our IT and Social Media needs
- We really could use someone knowledgeable in year-end corporate filings
- **Become a Board Member**
 - What does a Board member do?*
 - Meets monthly for about an 1-1/2 over lunch (a tough job!)
 - Assists on events and activities.
 - Advises and votes on Board actions
 - Takes lead in specific areas such as speaker arrangements, finances, website maintenance, meetings, etc.
 - Assists membership as needed and serves as a point of contact.
 - **All-in-all, spends a couple hours a month doing good things for his/her fellow retirees.**
- **Committee membership and support** is always needed and appreciated too!
 - Social, Financial, Communications, Event Support, Helping Hands, etc

Special Topics

- Member News

Open Discussion