

TMRS City Correspondent Certification Program

Austin, Texas

Tuesday, April 20 – Wednesday, April 21, 2009

AGENDA

Tuesday, April 20	Activity
8:30 a.m.	Sign-In, Continental Breakfast
9:00 a.m. – 11:30 a.m. <i>(10-min. break at approx. 10:00)</i>	<p>Day 1 Introduction, Pre-Assessment, Duties and Responsibilities of the Benefits Administrator</p> <p>Part A – Meet Adam Davis Topics: TMRS Basics, Enrollment, Service Credit, Beneficiaries, USERRA</p>
11:30 a.m. – 12:30 p.m.	Catered Lunch
12:30 – 2:30 p.m. <i>(10-min. break at approx. 1:15)</i>	<p>Part B – Meet Brent Burns Topics: Refunds, Divorce, Occupational Disability</p> <p>Review – Group Exercise Topic: TMRS Forms</p>
Wednesday, April 21	Activity
8:00 a.m.	Continental Breakfast
8:30 a.m. – 10:30 a.m. <i>(10-min. break at approx. 9:00)</i>	<p>Day 2 Introduction, Review and Summary of City Rates</p> <p>Part C – Meet Carmen Garza Topics: Buyback, Updated Service Credit, Proportionate Retirement, Change of Address, Retiring with TMRS</p>
10:30 a.m. – 12:30 p.m. <i>(10-min. break at approx. 11:30)</i>	<p>Part D – Meet Dee Parsons Topics: Taxes on Monthly Payments, Other Post-Retirement Issues, Death Benefits, Public Safety Officer Options</p> <p>Conclusion (Quiz and Evaluation)</p>