

TMRS City Correspondent Certification Program

Austin, Texas

Tuesday, November 16 – Wednesday, November 17, 2010

AGENDA

Tuesday, November 16	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>	Day 1 Introduction , Pre-Assessment, Duties and Responsibilities of the Benefits Administrator Part A – Meet Adam Davis Topics: TMRS Basics, Enrollment, Service Credit, Beneficiaries, USERRA
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>	Part B – Meet Brent Burns Topics: Refunds, Divorce, Occupational Disability Review – Group Exercise Topic: TMRS Forms
Wednesday, Nov. 17	Activity
8:00 a.m.	Breakfast
8:30 a.m. – 10:15 a.m. <i>(10-min. break at approx. 9:00)</i>	Day 2 Introduction , Review and Summary of City Rates Part C – Meet Carmen Garza Topics: Buyback, Updated Service Credit, Proportionate Retirement, Change of Address, Retiring with TMRS
10:15 a.m. – 12:00 p.m. <i>(10-min. break at approx. 11:30)</i>	Part D – Meet Dee Parsons Topics: Taxes on Monthly Payments, Other Post-Retirement Issues, Death Benefits, Public Safety Officer Options Conclusion (Post-Assessment and Evaluation)
12:00 – 12:30 p.m.	CITY PORTAL TRAINING