

Passion and Purpose:



TRANSFORMING RETIREMENT

May 24, 2012 * Pauley Ballroom * UC Berkeley

Conference Schedule

<u>Time</u>	<u>Event</u>	<u>Location</u>
8:00	Registration and Breakfast	West Pauley Ballroom
8:45	<i>The Baby Boomer Bomb</i>	West Pauley Ballroom
10:15	Workshop Sessions #1	
	Lifelong Learning	East Pauley Ballroom
	Retirement Income Strategies	Madrone Room
	The Journey of Aging	Tan Oak Room
11:15	Workshop Sessions #2	
	American Medicine	East Pauley Ballroom
	Finding Your Passion	Madrone Room
	Estate Planning	Tan Oak Room
Noon	Lunch	West Pauley Ballroom
1:15	<i>Human Memory, Aging & the Brain...</i>	West Pauley Ballroom
2:15	Workshop Sessions #1	
	Lifelong Learning	East Pauley Ballroom
	Retirement Income Strategies	Madrone Room
	Estate Planning	Tan Oak Room
3:15	Workshop Sessions #2	
	American Medicine	East Pauley Ballroom
	Finding Your Passion	Madrone Room
	The Journey of Aging	Tan Oak Room
4:15	Wrap-Up and Raffle	West Pauley Ballroom



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HR

SPEAKER BIOGRAPHIES

Brad Buchman is the Medical Director of University Health Services at UC Berkeley. He oversees the overall quality, accessibility, and provision of services to UCB students, staff, and faculty. Dr. Buchman is an Associate Clinical Professor of Family Medicine, Voluntary, at the UC San Diego School of Medicine. His interests include nutrition, fitness, and social interaction as key determinants of overall health.

Carolyn Collins is an estate planning, trust administration, and probate attorney in Oakland. Her services include wills, trusts, durable powers of attorney, deed preparation, decedents' estates, and long-term care planning. Ms. Collins also teaches Estate Planning at UC Berkeley Extension. Ms. Collins received her J. D. from UC Berkeley.

Patrick Cullinane, MS, is the Director of the UCB Retirement Center, and was previously the Director of Special Projects for the American Society on Aging (ASA) for 18 years. He serves on the Board of the National Association of Retirement Organizations in Higher Education, the Board of Trustees of the Strawberry Creek Lodge in Berkeley, and the Senior Advisory Committee of Kaiser Hospital Oakland.

Kathleen Davis is an advocate for public education for Older Adults and Adults with Disabilities. She is the Program Coordinator at the Berkeley Adult School. She is also a member of the faculty at the Acupressure Institute in Berkeley and a Co-director of the Tui Na Apprenticeship Program in Berkeley.

Russ Ellis was born in Los Angeles and spent his early years on a farm in Fontana, CA. From Compton High School, he won a track scholarship to UCLA where he obtained his Ph.D. in Sociology. At Cal, Russ taught social issues in architecture and urban design and served as Vice Chancellor for Undergraduate Affairs. He has two granddaughters.

Marian Gade worked as Clark Kerr's Research Associate for 35 years. She currently serves as Secretary of the UC Retirees' Association at Berkeley and chairs the all-campus Council of UC Retiree Associations. Marian is active in the SF Folk Music Club and enjoys working with emergency preparedness efforts as a ham radio operator.

Susan E. Hoffman is the director of the Osher Lifelong Learning Institute at UC Berkeley. She has worked at UC and CSU campuses launching new interdisciplinary and international programs for 15 years. She also served as the Executive Director of the California Confederation of the Arts. Her creative work includes writing and filmmaking.

Kelly Howard is the Manager for Talent Management at the UC Office of the President. Kelly has 13 years of experience in staffing and human resources and previously held the position of Director of Talent Acquisition and Employment Services at UC Berkeley, where she helped bring in

top talent. Kelly has a passion for working with retirees and has helped many retirees discover encore careers.

Maureen E. Kelly, Ed.D., LCSW is the Elder Care Counselor for Faculty and Staff at UC Berkeley. She brings more than 25 years of experience working with elders and their families. Currently, she facilitates a bi-weekly caregiver support group for faculty and staff, and she co-facilitates a caregiver support group at the Retirement Center.

Linda Lundberg, MA, is a career development professional with extensive experience in outplacement program design and service delivery. She currently leads the UCB Employment Services Transition Services Program providing re-direction guidance and job search support to staff impacted by budget cuts and re-structuring.

Kristen Miller is a 2011-2012 MSW intern with the CARE Services Elder Care program and enjoys learning from retirees and their spouses as part of her Master's program at the UCB School of Social Welfare. Previously, Kristen worked in higher education fundraising and volunteered with Kaiser Permanente Hospice, UCSF, and the Institute on Aging.

Nancy Pargot is a retirement counselor for Fidelity® Retirement Services. She is responsible for providing unbiased education to participants in UC's retirement program and for working with Human Resources to coordinate requests for educational opportunities. She currently is insurance licensed and holds her FINRA Series 7 and 66 licenses.

Gloria Parra is a former program manager with the UCB Retirement Center. She worked more than 20 years in Human Resources at UCOP and LBNL, and as a community college faculty member. A passionate lifetime learner, Gloria is a recent proud recipient of an Advanced Diploma in Local History from Oxford University.

Donald A. Riley, Professor Emeritus of Psychology, was an active member of the Psychology Department from 1950 to his retirement in 1991. He was Associate Vice-Chancellor for Academic Development from 1976-1980. He has been a participant in the Learning in Retirement Program at the UCB Retirement Center since its beginning in 2000.

Summer Scanlan is the Project Manager at the UCB Retirement Center. She manages many of the Center's major programs and services, including CRCN CalMail, Pre-Retirement Planning, and Learning in Retirement. Summer is an active member of Toastmasters International.

June M. Yee, CFP®, CLU, CLTC has been a financial advisor and insurance agent for over 20 years. Her focus is simple: to help her clients build financial security by providing a comprehensive roadmap that adapts to clients' changing financial needs. June is a Cal Alum and regularly speaks at the Retirement Center's Pre-Retirement Planning Program.

LECTURE NOTES

Keynote - *The Baby Boomer Bomb* Professor Robert Reich

As baby boomers age, major issues associated with a growing older population are gaining more attention, e.g., Social Security, Medicare and financing an extended retirement. Retirees confront these issues on a daily basis. Professor Reich will share his knowledgeable perspectives on these and other issues, suggesting how they can be addressed in an informed and responsible manner. In addition, he will discuss the older population's formidable political leverage - how as individuals and as a collective entity, their "clout" can be used wisely and in a manner benefitting future generations.

Robert B. Reich is one of the nation's leading experts on work and the economy. He has served in three national administrations, most recently as secretary of labor under President Bill Clinton. He has written thirteen books, including his latest best-seller, "Aftershock: The Next Economy and America's Future," and an e-book, "Beyond Outrage." His widely-read blog can be found at www.robertreich.org.

Plenary Session - *Human Memory, Aging and the Brain or Where Did I Put Those Keys?* Professor Arthur Shimamura

Forgetfulness is one of the most frequent complaints among older individuals. In recent years, from studies of Alzheimer's Disease and from new brain imaging techniques, we have learned more about human memory and how it changes with aging. Professor Shimamura will describe recent work on memory and aging and of course offer some tips on how to keep our memories fit.

Arthur P. Shimamura is Professor of Psychology at Cal and studies the biology of human memory through the use of brain imaging techniques and analyses of patients with memory disorders. Dr. Shimamura is a Scientific Adviser for the San Francisco Exploratorium Science Museum, and was awarded a Guggenheim Fellowship in 2008 to explore links between art, mind, and brain.

WORKSHOP DESCRIPTIONS

American Medicine: What You Need and How to Get It
Dr. Brad Buchman, MD, MBA will present on preventive medicine with a focus on screening tests and vaccinations.

Finding Your Passion: Explore Your Talents and Expand Your Network

Today's retirement offers many options for active involvement, including ongoing or new careers, entrepreneurship and volunteering. Join presenters Gloria Parra, Kelly Howard and Linda Lundburg, who will offer practical planning tools and strategies for using your expertise and interests to expand your network and fulfill your passion and purpose.

How to Make Sure That Your Estate Plan Does What You Want

Join local attorney Carolyn Collins to learn about estate planning tools such as wills, trusts, and durable powers of attorney. She will also address planning for incapacity, common estate planning mistakes and misconceptions.

The Journey of Aging

Retirees Marian Gade and Russ Ellis will share their voyages into retirement and reflect upon surprises they encountered and insights they gained. "Who am I becoming? What do I want to make sure I get done?" Attendees will have an opportunity to comment upon the panelists' experiences and share their own. Maureen Kelley and Kristen Miller will moderate this panel discussion.

Nurture Your Passions: Lifelong Learning

A panel of experts will discuss lifelong learning opportunities and the importance of staying intellectually active and engaged after retirement. Panelists include Professor Emeritus Donald Riley, Susan Hoffman, and Kathleen Davis.

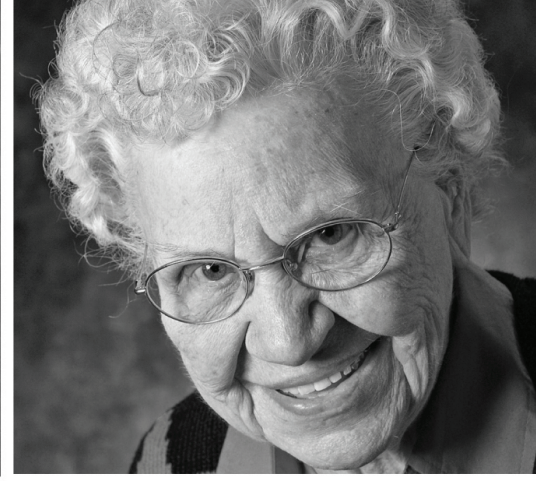
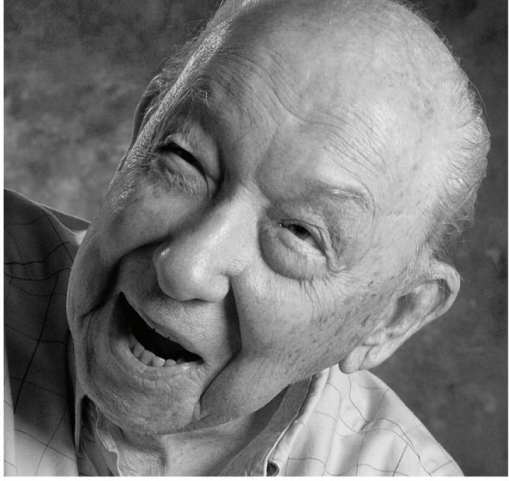
Retirement Income Concerns and Strategies

Learn the step-by-step process to organize one's financial assets in retirement from experts Nancy Pargot and June Yee, and the "how-to's" in managing longevity and long term care risks and avoiding common investment mistakes.

Don't forget to stop by the **Exhibitor Lounge**

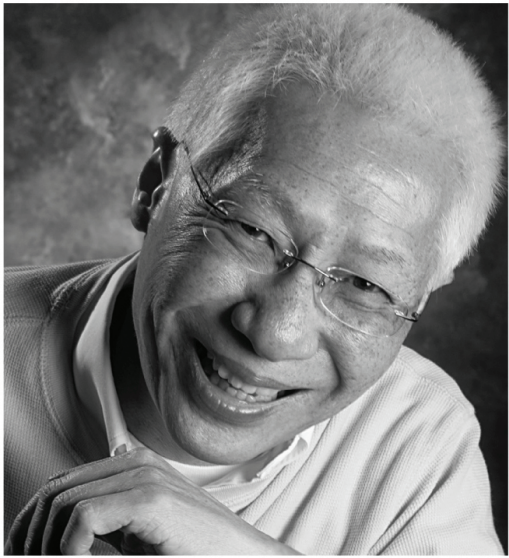
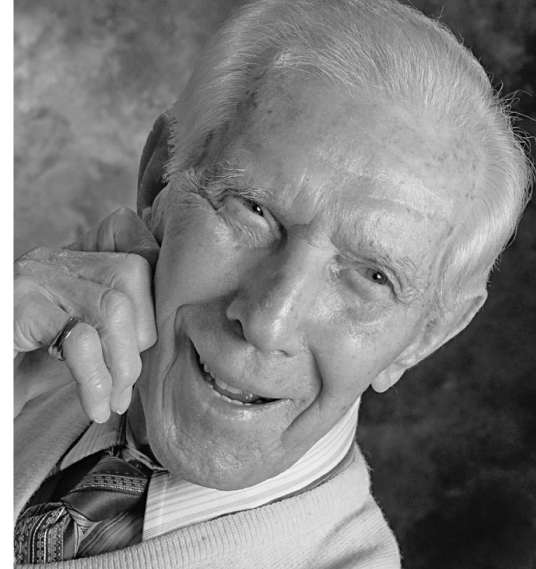
for useful information and resources!

Aging Resource Center	OLLI @ Berkeley
Anthem	Piedmont Gardens
Ashby Village	Road Scholar
Belmont Village	Social Security
Coming of Age: Bay Area	St. Paul's Towers
Delta Dental	UC Office of the President
Fidelity Investments	UCB Human Resources
Health Net	UCB Retirement Center
Kaiser Permanente	USE Credit Union
Lake Park	VSP



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