



## SCHEDULE OF PRESENTERS

***Save the Date for the 2014 Union Retiree Financial Forum,  
Hosted by United Labor Credit Union***

Thursday, March 20, 2014, 8 a.m. – 2:30 p.m.  
United Labor Credit Union, 6320 Manchester Ave., Kansas City, Mo.

8 a.m. – Registration and breakfast

8:15 a.m. – Welcome and Introductions, Erin Williams, Vice President, Marketing Business Development, United Labor Credit Union

8:30 a.m. – Morning Keynote: **“How the Affordable Care Act Impacts You as a Patient,”** Christa Smith, Vice President Business Development, Advanced Patient Advocacy

9:30 a.m. – **“Planning Your Estate to Avoid Pitfalls, Probate and Problems,”** Craig Reaves, CELA, President, Reaves Law Firm, PC

10:30 a.m. – **“Don’t Outlive Your Money!”** Robert Burks, Senior Vice President, RBC Wealth Management; **“Addressing Your Debt in Retirement,”** Tim Vogler, President, United Labor Credit Union

11:30 a.m. – **“Social Security Fundamentals: Guidelines for Making Well-Informed Decisions”** BlackRock Investments

12:15 Lunch – **“Get Screened!”** Mini-presentation by Walter Smith, Building Trades National Medical Screening Program; Catered by HyVee

12:30 p.m. – **“Four Main Responsibilities of a Fiduciary: Caring for Someone Else’s Money,”** (Help for Trustees Under a Revocable Living Trust) Consumer Financial Protection Bureau

1:30 p.m. – **“Government Health Care Programs Fundamentals,”** (Health Care Reform, Medicare Essentials, Veterans Affairs Health Care Benefits, Medicaid Essentials and a Summary of The Patient Protection and Affordable Care Act of 2010) RBC Wealth Management