

# Retirement Planning Seminar 2021

## An Interactive Retreat for Religious Professionals/Congregational Staff Planning to Retire in the Next Ten Years

Are you 50 years of age or older? Planning to retire within the next decade? Have questions about what might come next or about the mechanics of retirement (TIAA, Social Security, Medicare)? The 2021 Retirement Seminar is offered by the UUA Office of Church Staff Finances (OCSF) in partnership with the UUA Professional Development Office and the UU Retired Ministers and Partners Association.

**Content:** The Rev. Larry Peers, a national consultant, clergy coach, and Unitarian Universalist Minister, will be the featured presenter along with speakers from the Office of Church Staff Finances and the UU Retired Ministers and Partners Association (UURMaPA). Larry will lead engaging sessions from his workshop on “Finishing Strong, Ending Well: Crafting the Culminating Chapter of Your Ministry.” The focus of the “Finishing Strong, Ending Well” segments of the program include:

- How can you, as a religious professional, remain vital in the years leading up to retirement?
- How will you approach this chapter of your career in a way that is sustaining and communicates a legacy?
- How will you attend to your practical, your leadership, and your soul’s needs in this chapter in ways that can enhance personal and spiritual focus and renewal and prepare you now for moving into the “third age” of your life, what we call “retirement?”

OCSF Staff will present on the nuts and bolts of retirement including Medicare and health insurance, income streams and expenses, social security, the UUA Retirement Plan, and the transition into retirement.

**Where/When:** The 2021 Seminar will be conducted **online** in two parts. **Part One** will occur during the week of May 3, 2021 with 2-3 daily zoom sessions - 12:00 to 1:45 pm and 3:00 to 4:45 pm daily; and 7:00 to 8:30 pm ET (Monday and Wednesday only). Larry Peers will present during the first two sessions each day, the Monday evening session will feature a panel discussion by UURMaPA Board Members, and the Wednesday evening session will be an opportunity for participants to meet in small groups.

**Part Two** features two weekly zoom presentations (Tuesday and Thursday afternoons) by OCSF staff and Transitions Director beginning Tuesday May 11 and concluding May 29. These presentations, which will occur between 3:00 and 4:30 pm EDT, will provide information on retirement finances, investment options, social security, health insurance/Medicare, dental insurance, aid funds, and post-retirement employment options as follows:

**(All Webinars Offered 3:00 to 4:30 P.M. EDT)**

- Tuesday, May 11: Financial Implications of Retirement  
Linda Rose, UUA Retirement Plan Director
- Thursday, May 13: Accessing Your Funds: Nuts & Bolts  
Linda Rose and Charissa Benak, UUA Retirement Plan Specialist
- Tuesday, May 18: Understanding Investment Options (TIAA Plan)  
Rev. Richard Nugent, OCSF Director
- Thursday, May 20: Health Insurance/Medicare/Dental Insurance  
Jim Sargent, Director, and William Lester, Associate Director  
UUA Health Plans
- Tuesday, May 25: Understanding Social Security/Aid Funds  
Rev. Richard Nugent
- Thursday, May 27: Post-Retirement Employment and Seminar Follow-Up  
Rev. Keith Kron, UUA Transitions Director  
OCSF Staff

**Cost:** The cost for this time of reflection about and planning for your retirement is \$200. Spouses/Partners are welcome to join in the OCSF-led sessions at no additional cost.

**Registration Process:** In order to ensure opportunities for questions, we are planning to limit participation to 50 individuals. Again, this program is open to all religious professionals, including community-based ministers, and other congregational staff. Registration ends April 22. You can [apply online here](#). Given Covid challenges, we advise against mailing your registration to the UUA. We envision the next retirement seminar, hopefully in person, will be held in 2023.

After you register, you will immediately be directed to the payment portal, and you will have the option to pay via PayPal or credit card. Pre-seminar assignments and additional information about the seminar will be emailed to you in mid-April. We also anticipate a pre-seminar zoom call with the Seminar Team during the week of April 26.

Questions about the application process and/or this retreat can be directed to Mary Krigbaum, Retreat Registrar, at [ocsf@uua.org](mailto:ocsf@uua.org).

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