

# NPEA OPTIONS

*Newsletter of the National Preretirement Education Association*

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## FROM THE



**David Daly**

I hope you all had an enjoyable and productive summer. It was fairly typical here waiting for legislation and keeping busy processing another record number of retirements in this first wave of baby boomer retirees. At the same time, we were conducting

## PRESIDENT'S DESK

our annual evaluation of our programs and services and making any necessary changes to help us better meet the ever growing demand for information.

The NPEA Board has also been busy making the final arrangements for our annual conference in St. Louis and laying the groundwork for New Orleans in 2002.

We also made a selection for our 2003 conference - the Sandestin Hilton in Destin, Florida. If you liked Naples in 1999, you'll love Destin - it's a jewel along Florida's Emerald Coast.

Speaking of the Board, we have had a change since our last issue of Options. Denise Weaver left the Missouri State Employees' Retirement System (MOSERS) and consequently resigned from the Board. We're all sorry to see Denise go. She is an enthusiastic hard worker who was truly committed to helping NPEA achieve its goals. We'll all miss her and we wish her well in the future.

Susie Dahl, also of the Missouri State Employees' Retirement System,

has been appointed by the Board to replace Denise. Susie is the Manager of Benefit Services for MOSERS and is very active in many state and national associations. She has been a tremendous help to us as our site coordinator for this year's conference.

We're also happy to announce that after many years of discussion and planning, we are now in the final stages of developing our NPEA Web site, thanks to the efforts of Ken Wright. We hope to have it ready to launch at our conference in November. We'll be looking for your assistance along the way to make our Web site a valuable resource for our Systems and a retirement planning tool for our members.

If you're joining us in St. Louis, since we'll be away for Election Day again this year, don't forget to cast your absentee ballot. Participation in state and local elections is just as important as a national election and as we found out last year, every vote does count.





*"Education is the best provision for old age."*

- Aristotle

**Look for NPEA's Web site Coming This Fall**  
**www.npea.com**



*Featuring:*

-  Who We Are
-  Annual Conference Highlights
-  Contacts & Links
-  Articles & Information
-  System Profiles
-  and Much More

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## Future Conferences

2002 - New Orleans, LA  
October 19 - 23

2003 - Destin, Florida  
November 1 - November 5

## At This Years Conference

# Being Motivated & Educated

This years line-up includes speakers who are not only experts in their fields, but also have the ability to motivate and educate us to be able to meet the challenges and changes of our expanding roles as retirement planning educators.

## Speakers

### Dr. John Pelizza

A leading authority on productivity, team building, the change process, stress management, wellness and personal growth, Dr. John J. Pelizza, Ph.D., has addressed over 1,000 businesses, professional and civic groups across North America.



### Doug McCallum



Training and teaching adults for over 25 years, Doug McCallum brings an ability to educate, as well as entertain, plus a sense of humor and the right amount of empathy to every one of his programs. He has the expertise to help the new or seasoned trainer find techniques that work. The ideas and techniques he presents can be quickly adopted and easily implemented.

The recipient of numerous awards for his ability to lead seminars and professional training sessions, Doug last spoke to NPEA members in 1997 at the Baltimore, MD, conference.

### Don Blandin

Don Blandin was appointed president of the American Savings Education Council (ASEC) in 1996. The council's mission is to make saving and retirement planning a vital, permanent concern in the lives of Americans. It encourages initiatives aimed at raising public awareness about what is needed to ensure long-term personal financial independence.



### ... And a Host of Others

Attorney Robert Klausner will return to give us his annual legal briefing of legislation and case law effecting public pension plans. Ed MacDonald and Tom Sacksteder will examine the deep impact the Tax Reform Act of 2001 will have on our systems. Gary Findlay director of the Missouri State Employees Retirement System will be this year's keynote speaker.

During our breakout sessions, we'll have the opportunity to hear and share experiences about many of today's hot topics.

## Continuing Education Opportunities

### Basics of Investing

While it is vital that retirement professionals be intimately familiar with all aspects of their retirement system benefits, a general knowledge of investments and savings and investment strategies is also necessary.

This course will be informative, interactive and fun, and meets InFRE's continuing education requirements for four hours of CEU credit.

### Code of Ethics

One key indicator of a profession is a recognized body with a Code of Ethics that puts the needs of the recipient of any relevant service first.

This course will meet the specific ethics continuing education requirement and will count as two hours of continuing education for the current 12-month period.

# Exploring St. Louis

By Barbara Baird  
State of Illinois Retirement System

I pass through St. Louis, several times a year to visit my in-laws who live in the Missouri Ozarks. You'd think we'd be familiar with the city, but in our rush to get to Lake of the Ozarks, we've settled for a view of famous Gateway Arch from the distance of the by-pass. Last year, however, we altered our vacation plans to spend some time in St. Louis to get to know the city before our next NPEA conference.

We made reservations at the Adams Mark Hotel, our conference site, a radical departure from our usual hotel accommodations. As we approached downtown St. Louis, the Arch became increasingly prominent. The closer we got to the hotel, the more the Arch filled our view. The kids were craning their necks to look up at it, and for good reason, our destination was directly across the street from the Arch. This was a very good omen for our visit.

As we entered the hotel, the focus of attention was drawn to the horse sculptures that dominate the lobby. Of course, the high ceilings and chandeliers also added to the style of the hotel and widened the eyes of my children. Our room was everything you could expect from a first-class hotel. But the main attraction for my kids were the indoor and outdoor swimming pools, located on the roof, overlooking the Arch.

Forcing the kids away from the pool, we went exploring in the imme-

diately vicinity. We first walked around the Laclede's Landing area, a renovated historic district of St. Louis. There were shops, restaurants and a wax museum. We skipped the museum this time and dined at a local brewery. No, it wasn't connected with Anheuser-Busch. That historic brewery is in another part of



the city. We were told that a tour of the brewery is a must, but we couldn't fit it into our schedule this time.

We began the next day at the Gateway Arch. In case you've wondered, you can ride to the top. Just be sure you don't suffer from claustrophobia. While we waited for our turn to go up, we viewed a video showing the building of the Arch. When it was our turn, we got into small compartments that seated about 5 people and slowly

ascended to the top. The view was magnificent. If you choose to stay on the ground, below the Arch is a museum where you can follow the Lewis and Clark Expedition. In the park, a short walk away is the Old Cathedral, which is the first cathedral west of the Mississippi. A few blocks west is the Old Courthouse where the Dred Scott trial took place. It's now a museum where you can view a presentation about the settlement and growth of the city.

Our next stop was architecturally stunning Union Station. It was once the world's largest train station, and is now a national Historic Landmark, housing over a hundred shops and restaurants. A must see for anyone with a shopping list.

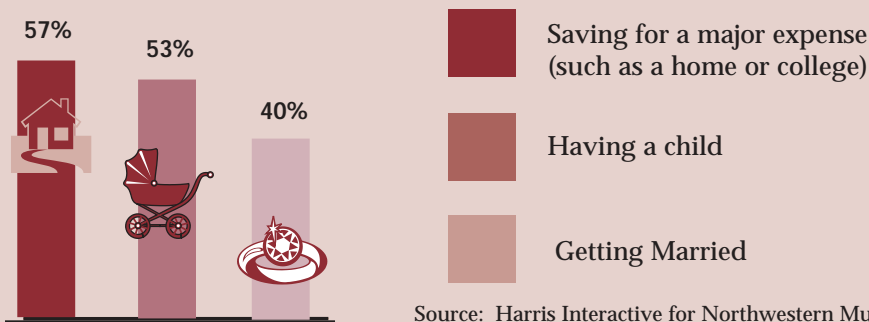
This trip wasn't long enough to hit all the attractions. There is the famous St. Louis Zoo, the Botanical Gardens, and dinner at one of the fine Italian restaurants on "The Hill," the city's Italian district. We'll try to add them to our agenda in November.

I was worried that St. Louis would be a letdown after exotic Naples and show-stopping Washington, D.C. Face it, it's the Midwest and isn't that synonymous with barren wasteland?

What I discovered was a city steeped in history, diverse attractions, eclectic cuisine and activities for most interests. Admittedly, as a Midwesterner, I have my bias. So join me in November in the city noted for explorers, we'll be pension pioneers... sorry, couldn't resist.

## What makes people \$ave

Participation in a company 401(k) plan often plays a role in getting people to start financial planning. Other factors that encourage financial planning:



Source: Harris Interactive for Northwestern Mutual

*"Life should begin with age and its privileges and accumulations, and end with youth and its capacity to splendidly enjoy such advantages."*

- Henry David Thoreau

# Americans Better Money Handlers

According to the American Express "Everyday Spending" Index, Americans are getting better at managing their money:



- \$ 94 percent** balance their checkbooks at least once a month
- \$ 85 percent** are aware of their current checking-account balances.
- \$ 81 percent** know the amount of their credit-card balances.
- \$ 64 percent** set a household budget for everyday expenses.

- USA Today

## Survey in the Works

# Who's Doing What?

Looking for information about video conferencing? Want to know how to set up a call center? Need help with developing a mid-career program? Wouldn't it be helpful to have a ready reference of what other systems are doing, so we can benefit from their experiences? We are in the process of developing a comprehensive survey that would provide us with another opportunity to share our successes (and failures) as we look for new and better ways to serve our members.

Technology and the growing demand for information have changed the landscape of retirement education. From new member orientation to meetings with retirees, we're expanding and giving our services, publications and programs a new look. Although we have seen or heard about many of these changes and innovations at our annual conferences over the years, we often return home to our hectic schedules and may not have the need or time to follow up immediately. But when we do get involved in a project, it would save time and effort to know who to contact for assistance.



We plan to have the survey available on the new NPEA Web site later this fall.

We ask that one person from each System print, complete and return the survey to the address listed. We'll post the results on the Web site and in hard copy form as part of our NPEA directory.

