

# NEED HELP WITH YOUR 403(b) or 457 PLAN?

## Preparing for Retirement: 403(b) and 457 Plan Essentials

**EVENT:** Good Teaching Conference - North Pre-Conference Session  
**DATE:** Friday, February 3, 2012  
**TIME:** 10:00 a.m. - 4:00 p.m.  
**LOCATION:** San Jose Marriott  
301 South Market Street, San Jose, CA 95113

### AGENDA AT A GLANCE

- Opening Keynote Address from Dean E. Vogel, CTA President
- What You Need to Know About Your Retirement
- Understanding 403(b) and 457 Plans and Making Every Dollar Count
- Be a Smart Investor
- Avoiding Financial Services Predators
- How to Utilize CTA Investment Education Resources in Your Chapter

### PRESENTERS:

- Rick Rodgers, CRC, AIF, *Insight Employee Benefits Communications*
- Carole Anne Luckenbach, AIF, CEBS, ARM  
*CTA Risk Management/Business Initiatives & Development Department*

There is **no fee** to attend this conference and registration is open to all CTA members. However, given the importance of sharing CTA's investment education resources with local members to promote informed investment decisions and help educators with their retirement savings, **release time is available for two members per chapter** (*with the written approval from the Chapter President*). Travel and related expenses are the responsibility of the participant.

Under the 2012 Good Teaching Conference, click on **Register online** below **GTC North**. When you get to the registration page, select **Conference Participant** and follow the prompts. Registration is available at [www.cta.org/conferences](http://www.cta.org/conferences). Registration for the 403(b) & 457 pre-conference session closes **January 20, 2012**. We encourage attendees to register and stay for the Good Teaching Conference – North.



INVESTING FOR *YOUR* FUTURE.

[CTAinvest.org](http://CTAinvest.org)



CTA release time is limited to two CTA member participants from each local chapter with approval from the Chapter President. Release time is ONLY for release of the CTA member from work duties on Friday, February 3, 2012, to attend the conference. CTA will reimburse the District upon receipt of an invoice. Release time WILL NOT provide any travel or additional expenses incurred. We recommend that the chapter president consider approving release time for one leader and one newer member. *Preparing for Retirement: 403(b) and 457 Plan Essentials* is a special pre-conference session and requires a separate registration from the Good Teaching Conference – North 2012. However, you must register online as part of your GTC-North registration. The deadline to apply for release time is January, 20, 2012.

### Request for CTA Release Time

#### PART A

*To be completed by CTA member requesting release time*

Name \_\_\_\_\_ CTA Individual ID Number \_\_\_\_\_

Address \_\_\_\_\_

Phone Number \_\_\_\_\_ Email \_\_\_\_\_

Association \_\_\_\_\_

Name of Superintendent \_\_\_\_\_ School District \_\_\_\_\_

School District Mailing Address \_\_\_\_\_

School District Phone Number \_\_\_\_\_

Signature (*CTA member requesting release time*) \_\_\_\_\_ Date \_\_\_\_\_

#### PART B

*To be completed by local association Chapter President*

Approval Granted by the Chapter President:  Yes  No

Name of Chapter President \_\_\_\_\_ Association \_\_\_\_\_

Association Address \_\_\_\_\_

Home and Cellular Phone Number \_\_\_\_\_ Email \_\_\_\_\_

Signature (*Chapter President*) \_\_\_\_\_ Date \_\_\_\_\_

Please submit to: **CTA Risk Management/Business Initiatives and Development**  
1705 Murchison Drive, Burlingame, CA 94010  
Phone: (650) 552-5200 · Fax: (650) 552-5014 – Email: [sjung@cta.org](mailto:sjung@cta.org)

