

MTA *REPORTER*

RETIRED *The Voice of MTA Retired Members*

MTA 15th Annual Retired Members Gathering
Wednesday, September 28, 2016 | Sheraton Framingham

Aug. 2016

AGENDA AND REGISTRATION FORM

First Name:	Last Name:	MTA Member ID:
Address:		
City/Town:	State:	Zip:
Phone:	E-mail:	
Dietary Restrictions and/or other needs:		

Indicate your 1st and 2nd choices for each session:

8 a.m. - 9:30 a.m. Registration & Full Breakfast

VOTE Giveaway / Product Display Area

9:30 a.m. - 10:20 a.m. Opening Session

10:30 a.m. - 11:45 a.m. Workshop Session I

- A. Elder Law Part I: The Nuts and Bolts of Estate Planning
- B. Zumba
- C. Financial Advice for Retirees
- D. Genealogy I: Genealogy Fundamentals
- E. Social Media for Beginners
- F. Worcester Art Museum
- G. Mindfulness Based Stress Reduction

12 Noon - 1:15 p.m. Workshop Session II

- A. Elder Law Part II: Life Care Planning
- B. Chair Yoga
- C. Reverse Mortgages in 2016 and Beyond: Facts & Misconceptions
- D. Genealogy II: Technology and Online Databases
- E. Social Media for Intermediate Users
- F. What's At Stake in November?
- G. Professional License Renewal

1:20 p.m. - 2:15 p.m. BOX LUNCH & ICE CREAM SOCIAL

2:15 p.m. - 3:30 p.m. Workshop Session III

- A. Elder Law Part III: Understanding & Using Trusts – A Little More Than Just the Basics
- B. Senior Fitness
- C. Fraud, Identity Theft and Scams
- D. Genealogy III: Records – The Other 95%
- E. Social Media for Social Activism
- F. MTAB Dental Plan Overview

**REGISTER NOW
ONLINE!**



**REGISTER
By September 16
for only \$35
(\$40 after September 16)**

www.massteacher.org/retired

Online Registration has two payment options,
Credit Card or Check.

Or complete and mail this form with your check made payable to the MTA to:

Eric Smith
c/o MTA
2 Heritage Drive, 8th Floor
Quincy, MA 02171-2119

Questions?
Contact Eric Smith
esmith@massteacher.org
800.392.6175, ext 8194

**REGISTRATION DEADLINE
SEPTEMBER 21
(or until conference is full)**

Workshop	Description
ELDER LAW PART I: THE NUTS & BOLTS OF ESTATE PLANNING <i>Deborah K. Blum-Shore, Esq., Partner, The Shore Law Firm</i>	<p>Estate planning engages us in confronting the financial and emotional consequences of death and disability, and allows us to take control of our futures. During the first session, we will learn about the fundamentals of a well-crafted estate plan. We will discuss each of the important documents that everyone should have: Durable Power of Attorney, Health Care Proxy, Living Will, HIPAA Release, Last Will & Testament, and a Declaration of Homestead. We will also introduce trust planning and probate alternatives. Throughout our discussion, we will identify the special needs of people in second marriages, unmarried couples, and families with disabled children.</p>
ZUMBA <i>YMCA Metrowest</i>	<p>A fusion of Latin, international music, and dance themes that create dynamic routines focusing on fitness interval training with a combination of slow and fast rhythms.</p>
FINANCIAL ADVICE FOR RETIREEES <i>Jonathan Pond, Spokesperson for SBLI, Mass. Savings Bank Life Insurance</i>	<p>Jonathan Pond is one of America's most trusted and knowledgeable financial experts and a pioneer in bringing low-cost personalized money guidelines to American households. His work in educating the public on financial matters has been far-reaching and widely recognized. His 16 prime time public television specials and 11 books have been critically acclaimed for their effectiveness in providing useful and understandable financial guidance to people of all financial circumstances. His customized financial review reports are the most popular thank-you gift in public television history. He is widely sought out as an objective and entertaining observer of the investing and financial planning scenes and has made frequent national appearances on network and cable television stations, including CNN and NBC's Today Show.</p>
GENEALOGY I: GENEALOGY FUNDAMENTALS <i>Susan O'Connor</i>	<p>Genealogy Fundamentals introduces participants to the vocabulary, standard practices, essential tools, and genealogy forms to discover one's family tree. Participants will learn how to capture what they already know and where to look around their homes for additional information, and how to ask questions of others.</p>
SOCIAL MEDIA FOR BEGINNERS <i>Jair Mendes & Scott McLennan, MTA Communications Division</i>	<p>This workshop will focus on the very basics of using and enjoying Facebook and Twitter, and offer an overview of other social media platforms. We will cover the how-to's of setting up an account, posting messages and pictures and connecting with friends and family members. Participants should bring a computer, tablet or smartphone they can use to access their social media accounts or to set up accounts.</p>
MINDFULNESS BASED STRESS REDUCTION <i>Ethel Fraga, MTA Retired, MBSR Instructor</i>	<p>Mindfulness Based Stress Reduction teaches practices which promote wellness. In this class the instructor will talk about practices such as learning to be present by using the breath as anchor, practicing kindness toward self and others, consuming mindfully and a very simple approach to meditation which will help you to detach a bit from persistent thoughts and feelings. We may even laugh a little.</p>
WORCESTER ART MUSEUM <i>Ginny Powell-Brasier, Docent from the Worcester Art Museum</i>	<p>A volunteer docent from the Worcester Art Museum will present on the impressive art collection of the Worcester Art Museum. MTA members get a two for the price of one admission to the Museum through MTA Benefits by just showing their MTA card.</p>
ELDER LAW PART II: LIFE CARE PLANNING <i>Deborah K. Blum-Shore, Esq., Partner, The Shore Law Firm</i>	<p>Long-term care planning isn't just about nursing homes anymore. In this session, we will learn about the continuum of long-term care: what is it, and how do we pay for it? Because of changes in the law, it is more important than ever to plan ahead for the care we might need in the future. We will discuss the eligibility rules for Medicaid and Veteran's long-term care benefits, including asset limits, look back periods, ineligibility penalties, and estate recovery. Finally, we will review some of the strategies available to preserve your hard earned assets and to ensure that you receive the best possible care.</p>
CHAIR YOGA <i>YMCA Metrowest</i>	<p>Chair Yoga adapts yoga positions and poses through the creative use of a chair. The chair replaces the yoga mat and allows for poses to be performed seated or standing using the chair for support during standing poses. Chair yoga is suitable for all ages, fitness levels, and physical conditions.</p>
REVERSE MORTGAGES IN 2016 AND BEYOND: FACTS AND MISCONCEPTIONS <i>Jerry S. Congdon, Esq., Reverse Mortgage Specialist, Berkshire Bank</i>	<p>The cost of reverse mortgages has fallen and the use of reverse mortgages has expanded greatly. Financial planners, attorneys and realtors understand the financial benefits for clients which is fueling the demand for reverse mortgages. Due to the amount of misinformation and confusion in the marketplace about reverse mortgages, this seminar will review the facts and dispel the myths about reverse mortgages to provide participants a clearer understanding of how a reverse mortgage works. Some topics to be covered include: How a reverse mortgage can be used to stretch a retirement portfolio? How to convert home equity into a tax-free income source? How to free up cash flow by eliminating an existing mortgage to fund long term care needs? How a reverse mortgage line of credit option provides for an increasing amount of funds? The new lower cost structure. The seminar is designed to provide time for questions.</p>

Workshop	Description
GENEALOGY II: TECHNOLOGY AND ONLINE DATABASES <i>Susan O'Connor</i>	<p>Technology and Online Databases introduces participants to the technology skills, software and online resources that can be used to uncover one's family tree. Emphasis will be placed on citing sources and searching online databases.</p>
SOCIAL MEDIA FOR INTERMEDIATE USERS <i>Jair Mendes & Scott McLennan, MTA Communications Division</i>	<p>This workshop is aimed at those who already have a solid working knowledge of one or more social media platforms and are ready to expand their digital footprint or learn more about the sites they already enjoy. Participants should bring a device they can work on as we explore ways to share and find information.</p>
WHAT'S AT STAKE IN NOVEMBER? <i>Jo Ann Fitzgerald & Paul McClory, MTA Grassroots Division</i>	<p>Charter schools currently siphon over \$400 million dollars from our school districts. There is no local control or local approval of these schools.</p> <p>On November 8 when you go to the polls there will be a ballot question that will threaten public education even more because Question 2 seeks to lift the current cap on charters.</p> <p>Join us to learn more about charters and how to defeat Question 2.</p>
PROFESSIONAL LICENSE RENEWAL <i>William Durkee, MTA Prof. Dev. Associate, Div. of Training and Prof. Learning</i>	<p>This workshop explains the regulatory requirements covering license renewal (formerly recertification) for those who hold a Professional License. The presenter will explain how the retired educator documents his/her professional learning to renew licenses.</p>
ELDER LAW PART III: UNDERSTANDING & USING TRUSTS – A LITTLE MORE THAN JUST THE BASICS <i>Deborah K. Blum-Shore, Esq., Partner, The Shore Law Firm</i>	<p>Trusts are an important part of many estate and long-term care plans. In this session, we will explore revocable and irrevocable trusts, and discuss the many goals that trusts of all kinds can achieve. This session is limited to people who have previously attended one of Ms. Blum-Shore's estate or life planning sessions today or at previous gatherings.</p>
GENEALOGY III: RECORDS — THE OTHER 95% <i>Susan O'Connor</i>	<p>Contrary to popular belief, only about 5% of genealogy related information is available online. Participants in Records — the other 95% will learn where the remaining records are located, how to access them, what they contain and how the information can bring their ancestors to life. Sample of such records include: federal and State Census, vital records, land records, court records, newspapers, city directories, immigration records, etc.</p>
FRAUD, IDENTITY THEFT AND SCAMS <i>Janice Fahey and Gary Gagnon, Attorney General Maura Healey's office</i>	<p>As a savvy consumer, you have a duty to be on alert for potentially fraudulent or misleading tactics used by scammers and identity thieves. Please join the Office of Attorney General Maura Healey on Wednesday, September 28th, 2016 to learn more about these important topics and many other resources that the People's Law Firm has to offer! One of the missions of the AGO is to help educate Massachusetts consumers about their rights and about ways to protect themselves. We will provide information to help you make informed decisions and to offer some tips to help you to avoid deception. Come to hear representatives from the AGO speak about what you may need to know about methods used by scammers and how to avoid becoming a victim. We hope to see you there!</p>
SENIOR FITNESS <i>YMCA Metrowest</i>	<p>Low impact cardiovascular exercise, strength training, balance and flexibility to help older adults become more active and improve overall fitness.</p>
SOCIAL MEDIA FOR ACTIVISM <i>Jair Mendes & Scott McLennan, MTA Communications Division</i>	<p>With the Save Our Public Schools campaign in full-swing, social media is a vital tool for spreading the message on why it is important to vote "No" on Question 2 and to make sure that Massachusetts keeps the cap on charter schools. Participants should bring a device they are comfortable using for social media and be prepared to work with training staff on messaging campaigns and strategies for engaging voters in this critical election.</p>
MTAB DENTAL PLAN OVERVIEW <i>Garrett Mowry, Professional Insurance Services, Inc.</i>	<p>Garrett Mowry of Professional Insurance Services, Inc. will present on a new group-rated dental insurance plan offered through MTA Benefits. This dental insurance would be of particular interest for retiring or already retired members who need dental benefits, if your family needs benefits or if you have dental coverage and need additional coverage. The workshop will compare this new MTA Plan to other coverages retirees carry.</p>



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MTA/NEA RETIRED DUES RENEWAL

MTA/NEA Retired dues renewal forms are mailed beginning in mid July.

Two membership renewal options are available:

ONLINE..... Go to www.massteacher.org/retired to renew online using a credit card.

MAIL Send your check made payable to the MTA for the total amount, along with the renewal form in the reply envelope that will be provided.

Membership applications will be processed as they are received, and you will get your new membership card in the fall. Please continue to use your present membership card until the new one arrives.

QUESTIONS

Membership Status	617.878.8118 800.392.6175, Ext 8118
Membership Cards/Calendars	617.878.8208
Renee Gatewood	800.392.6175, Ext 8208
MTAB Directory	800.336.0990



IMPORTANT!
REGISTRATION
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Wednesday, September 28, 2016

Sheraton Framingham
1657 Worcester Road
Framingham, MA
508.879.7200

SPACE IS LIMITED

Guarantee your spot immediately by registering online:

www.massteacher.org/retired
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