Meeting of November 16, 2012

AGENDA ITEM D

UCRS – Power of Attorney or Conservatorship

At the request of the Chair of the UCRSAB, an overview will be provided on the implications for a member's UCRP benefits and Retirement Savings Plan accumulations should the member become mentally incapacitated and some precautionary measures a member can take in advance to manage the implications, should such an event occur.

Additionally, the financial fitness library on the UC Focus on Your Future website provides a brief tutorial on estate planning that contains information on actions members can take to protect themselves and their financial assets should they become disabled or mentally incapacitated. The tutorial can be accessed from the following link:

https://ucfocusonyourfuture.mysecurebenefitsportal.com/FinancialFitnessLibrary/Overview/1