INTERNATIONAL SOCIETY OF CERTIFIED EMPLOYEE BENEFIT SPECIALISTS

INTERNATIONAL CEBS SOCIETY

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ISCEBS Nebraska Chapter Program
How to Educate an Aging Workforce
June 20, 2017

Please join the Nebraska Chapter for our June program "How to Educate an Aging Workforce" on Tuesday, June 20, 2017 from 8:00 to noon at SAC Museum, Conference Room, 28210 W. Park Hwy., Ashland.

There will be three sessions, each led by a different speaker:

- **Session 1: Medicare/HSA**
  (Speaker: Yvonne Warren, Individual and Medicare Enrollment, OCI)
  - Enrollment
  - When employer or union coverage ends
  - Overview of Part's A, B, C and D
  - Premiums
  - Medigap Plans
- **Session 2: Social Security Planning**
  (Speaker: Shelley Occhiuto, Advanced Markets Specialist, Mutual of Omaha)
  - What do you need to file for Social Security?
  - Social Security Eligibility
  - Benefit Statements
  - Retirement Planning
  - What is a Breakeven Point?
  - Taxes
- **Session 3: Long-Term Care Insurance (Webinar)**
  (Speaker: Rob Morrow, Account Executive, LTD Solutions, Inc.)
  - What is and what will LTCi do for you?
  - When is the best time to have the LTCi conversation?
  - How much will a plan cost?
  - How does LTCi work?
  - Who can apply?

Date:	Tuesday, June 20, 2017
Time:	8:00 - 8:30 am - Registration 8:30 - Noon - Sessions (Breakfast will be provided.)
Location:	SAC Museum Conference Room 28210 W. Park Hwy Ashland, NE (Directions)
Cost:	$40 Chapter Members $50 Non-Members
Registration:	Please click here to register via PayPal.
CE Credit:	Qualifies for three (3) CEBS CPE credits Pending for three (3) NE insurance credits.
Questions:	Sarah Coates, (402) 384-5749, sarah.coates@milliman.com

SPEAKERS:

Yvonne Warren
Individual and Medicare Enrollment
OCI

Yvonne attended KU in 1991, where she studied Criminal Science and Psychology before moving to a smaller school after an injury ended her collegiate softball career. Yvonne has since relocated to Omaha from the Scottsbluff, NE area back in 2009, at which time opted for a new career path. Working Human Resources and Sales in her former life she decided on Health Insurance and has been licensed for 6 years and has been with the same company for 8 years. She has worked her way through the Group benefits department and has found her niche working in the Individual Health and Medicare areas focusing the Affordable Care Act and how it affects the American consumer.

Shelley Occhiuto, ChFC, CLU, CASL, CMFC
Advanced Markets Specialist
Mutual of Omaha

Shelly has worked in the retirement industry for 32 years, specializing in retirement income planning, Social Security planning and employer plan design. She is the current President of the Omaha Chapter of the Society of Financial Service Professionals, and past member of the board of NAIFA. Shelley has published several articles in industry publications on the subject of retirement income planning.

Rob Morrow
Account Executive
LTC Solutions, Inc

Rob is a long-term care insurance expert working towards his CEBS professional designation. Working to support brokers and educate employers in a dynamic market, he facilitates the long-term care insurance conversation among brokers, human resource professionals and employees. His past experience working as an LTC Benefit Consultant with LTC Solution's Customer Service team lends his unique ability to understand the employee and the employer's perspective and assists him in successfully conveying the importance of long-term care insurance as an employee benefit to all parties involved.

Before joining LTC Solutions, Rob spent 10 years as a high school teacher and coach. Through his background in teaching, he tackles the long-term care insurance market from an educational perspective. Rob has a Bachelor's Degree in History from the University of Washington.

CEBS CPE APPROVED

Educational sessions at this program qualify for three (3) CEBS continuing professional education (CPE) credits. Visit www.cebscpe.org for more information.