

DATE: 10/27/2024

TO: Cathy Lee Gierke, OCC Co-Chair,
Julia Wallace, UMRA Archivist

FROM: Andrew F Whitman FLG facilitator

RE: Annual Report 2023-24, Finance & Law Interest Group

Purview and focus of the organization

Financial & Legal Issues Group (FLG) is designed to permit greater depth and continuity of discussion to facilitate problem solving and resource identification of retiree's financial and legal issues. UMRA sponsored various workshops on financial and legal issues in recent years, since the UMRA Board of Directors approved the creation of a Financial & Legal Issues Group in 2017.

Link to organization's website and meeting minutes: i.e.

<https://usenate.umn.edu/committees/>[....]

Commercializing UMN Research & Inventions- Yields Excellent, Lasting Returns Apr 15, 2024, 10am

<https://umra.umn.edu/news/commercializing-umn-research-inventions-yields-excellent-lasting-returns>

When will the Medicare advantage bubble burst? Part 2 May 6, 2024, 12:45pm

<https://umra.umn.edu/news/when-will-medicare-advantage-bubble-burst-part-2>

Medicare Advantage and Traditional Medicare: Issues & Choices

September 16, 2024, at 10am

<https://umra.umn.edu/news/medicare-advantage-and-traditional-medicare-issues-choices>

Financial Life in Retirement September 30, 2024, at 10:00 AM

<https://umra.umn.edu/taxonomy/term/101>

Life & Estate Plans: Life, Incapacity, and Gifting

Nov 11, 2024, 10am

<https://umra.umn.edu/news/life-estate-plans-life-incapacity-and-gifting>

Taxes and Elections and Sunsets, Oh My! Tax planning for 2024 and beyond.

December 2, 2024, at 10:00 AM

<https://umra.umn.edu/taxonomy/term/101>

Activities in which you participated (i.e., number of meetings, special sessions, etc.)

2023-24 member on the Senate Campus Safety Committee and the Senate Judicial committee; no longer on the Retirement sub-committee, which I think disbanded.

2022-23 member of RETIREMENT SUBCOMMITTEE

[your response here or N/A]

Key issues or problems addressed by the organization, particularly those with relevance to UMRA.

I think the following may be of interest to UMRA members

The OHR sends information to employees that may be of interest to UMRA members:

<https://view.ecomunications2.umn.edu/?vawpToken=l3MAKY2H6SCELJSCEU4HLEAIFM.60239>

**UMRA members may also be interested in the Following:
How Exempt Organizations Can Benefit from Clean Energy Incentives
October 22, 2024**

[Article on How Exempt Orgs Benefit from Clean Energy Credits and Incentives](#)

Article

Incentivizing the Climate Economy: How Sections 48 and 48E Are Boosting Clean Energy Investments

[Article on Renewable Energy Credits and Incentives](#)

Advice for future liaisons to enhance their engagement in the organization's activities and/or decision making.

I'm attempting to gain one UMRA member to chair, be the facilitator/organizer of each of the five zoom sessions. Sessions are scheduled for the year -- see below. All sessions will be on zoom. Registration is required. After each session a link to the zoom recording is posted on the UMRA web-site, and emailed to registrants.

What could UMRA be doing that would help you?

[your response here or N/A]

Suggestions for what you and/or the organization you work with could do that would help UMRA move forward?

[your response here or N/A]