

# WISCONSIN COALITION OF ANNUITANTS

Summary 2017

## Coalition Directors Meetings

Eight monthly meetings were conducted and the 26th Annual Conference was held on Friday, May 19th, at the American Family Headquarters, Madison. The eight monthly meetings were held at WEAC, 33 Nob Hill, Madison, Wisconsin. Due to limited legislative activity we did not meet in July or December. April's meeting was cancelled due to unavailability of presenters. Average attendance at monthly meetings was 27 with a high of 32 and a low of 22. Of the organizations the number of directors and alternates attending the monthly meetings was an average of 22 with a high of 26 and a low of 19.

## Directors added

1/23 James Blank, Director, Bay Lakes United Educators - Retired, BLUE-R.

3/20 Jim Thiel, Director, Association Career Employees.

10/16 Barbara Bird, Director, Department of Transportation.

On December 8, 2017, Director Dwayne Rohweder passed away. Dwayne was one of the WCOA founding directors.

## Motions approved

1/23 MSC The WCOA will send a letter to the Legislative Audit Committee in support of SWIB and ETF.

1/23 MSC The WCOA approve payment of the annual website bill of \$650.00.

3/20 MSC The WCOA approves WCOA representation/presentation before the Joint Committee on Finance.

## Guests/Speakers

1/23 Chris Preisler, Communications Specialist, SWIB.

Tarna Hunter, Legislative Liaison, ETF.

2/20 Dan Schmidt, Principal Analyst and Operations Manager, WI Legislative Council.

Tarna Hunter, Legislative Liaison, ETF.

Vicki Hearing, Communications Manager, SWIB.

3/20 Tarna Hunter, Legislative Liaison, ETF.

Chris Preisler, Communications Specialist, SWIB.

6/19 Mark Lamkins, Director, Office of Communications, ETF.

Chris Preisler, Communications Specialist, SWIB.

8/21 Tarna Hunter, Director of Strategic Engagement and Government Relations, ETF.

Bob Conlin, Secretary, ETF.

Mark Lampkins, Director, Office of Communications, ETF.

Chris Preisler, Communications Specialist, SWIB.

9/18 Chris Preisler, Communications Specialist, SWIB.

Tarna Hunter, Director of Strategic Engagement and Government Relations, ETF.

10/16 Tarna Hunter, Director of Strategic Engagement and Government Relations, ETF.

Chris Preisler, Communications Specialist, SWIB.

11/20 Michael Williamson, Executive Director, SWIB.  
Chris Preisler, Communications Specialist, SWIB.  
Tarna Hunter, Director of Strategic Engagement and Government Relations, ETF.

**Annual Conference May 19, 2017, American Family Headquarters, Madison.**  
Presenters handouts are available at [www.wicoa.org](http://www.wicoa.org).

Michael Williamson, Executive Director, State of Wisconsin Investment Board.  
"Protecting and Growing the WRS for a Strong Future"

Lisa Lamkins, AARP-WI, Advocacy Director.  
'What the Heck is Going On in Washington DC?'

William Ford, Elected Annuitant Representative, Employee Trust Funds Board.  
'The Responsibilities of a ETF Board Member'

Kevin McKinley, Financial Advisor/Planner, McKinley Money, LLC.  
'On Your Money', financial planning steps retirees should take.

Robert Conlin, Secretary, Department of Employee Trust Funds.  
'Wisconsin Retirement System: Strong for Wisconsin'