

External Events Report (Sue Fraser/Peggy Day)

UWRA Seminar: Fraud Prevention & Awareness for Seniors

This event was held on Thursday, April 27, 2023, in person at East Campus Hall, Room 1111. Approximately, 24 people attended in person and approximately 14 others connected online. The presenter was Nizar Kubursi, a Wealth Advisor at CIBC Wood Gundy, where he provides comprehensive financial planning and investment advice to individuals, families, and businesses. The presentation was well received, and Nizar offered to send the notes from this event to all attendees. Those attending in person filled out a form giving Nizar permission to send them these notes. An email was sent to the online attendees to also receive permission from them to obtain these notes.

A lot of positive feedback from attendees about this seminar has since been received.

UWRA Seminar – 9 Steps to a Simplified Estate

The above event was held on November 9, 2022, at the Erb & Good Funeral Home in the Fireplace Lounge with 40 people in attendance. The organizer of this event at the funeral home was Cam Hahn. The presenter was to be a local lawyer, Paul Layer, but then there was an update, and the presenter was Anthony Gordon from Toronto who holds several degrees about retirement. The seminar title was updated to **“9 Struggles Executors Face”**. It was well presented and included a booklet for attendees to take notes, this was followed by a question-and-answer period. There was a draw for prizes at the end of the seminar including two books authored by Anthony Gordon with regards to retirement.

Catherine Bolger, Communications & Administrative Coordinator for the UW Staff Association attended to see if this event (noon hour session) would be of possible interest to staff at UW. The UWSA event will take place during the noon hour on Wednesday, May 3, 2023. Unfortunately, we were unable to live-stream this event for UWRA members not living in the Waterloo area.

Feedback from Erb & Good has advised us that there are other UWRA retirees who were unable to attend this event and would like the UWRA to follow up with another session. Sue Fraser will investigate this to take place sometime in the Fall of 2023,

Respectfully submitted: Sue Fraser, UWRA Past President