

Silver Jackets Meeting

Tuesday September 11, 2018

Georgia Tech Student Center, Room 343

Minutes

Members and 1 Visitor Attending (25 total): Kathy Tomajko (Library), Ron Bohlander (GTRI), John Balsam (GTRI), Janis Goddard (OSP), Len Parsons (MGT), Julia Parsons (Visitor), Bob Green (MGT), Steve Dickerson (ME), Pat Davis (COS), Susan Keenan (Language Institute), Annette Satterfield (Registrar), Bill Ernst (Ch.E), Jo McIver (Registrar), Ward O. Winer (ME/COE), Tim Long (EAS), Andy Smith (Psych), Ed Rondeau (R.E. Development), Ian Gatland (Phys), Tom Morley (Math), Beryl Martinson (Language Institute), Margaret Boehme (ECE) Sam Shelton (ME), Steve Bomar (GTRI), Sandra Thornton (Public Policy), Sally Hammock (Student CTR/CAE).

Business Meeting

Kathy Tomajko, Silver Jackets President, greeted and welcomed the attendees. She introduced other SJ officers: John Balsam, Vice President, Janis Goddard, Secretary, Earl Cagle, Treasurer, Ron Bohlander, Past President and Membership Chair, and Sally Hammock, Social Committee. Also, David Millard is the SJ representative on the Faculty/Staff Benefits Committee.

Attendees introduced themselves and stated their GT department or unit.

A couple Business items:

The SJ officers met in August. They decided that a survey of the membership would be a good idea. The survey committee is John Balsam, Sally Hammock, Ron Bohlander and Kathy Tomajko. More information will be available as the survey is developed.

Caroline Dotts, Campus Recreation Center Associate Director, Healthy Lifestyles, reached out to the Silver Jackets. She is interested in partnering

with the Silver Jackets related to campus engagement and staying physically active. John and Kathy will meet with her on Sept. 24.

The AROHE (Association of Retirement Organizations in Higher Education) biennial national conference will be held Oct. 7-9 at Emory University. John and Kathy plan to attend. Brochures are available if you are interested.

Sally Hammock has stepped down as the SJ representative on the GT Staff Council. Nannette Dooley has agreed to take her place and attend their monthly meeting.

Program

Thanks to John Balsam, SJ Vice President for arranging for our speaker today. John introduced the speaker, Roger W. Lusby III, CPA, CMA, AEP, CGMA. Roger Lusby is the Managing Partner of Frazier & Deeter's Alpharetta office, and he is a member of the tax department in charge of coordinating tax and accounting services for the firm's clientele. Mr. Lusby spoke on The Impact of Tax Law Changes to Investment Strategy and Estate Planning in Retirement. He went over the new tax rates and standard deductions, the new rules for personal exemptions, miscellaneous itemized deductions, the mortgage interest deduction, charitable contributions, and the alimony payments deductions. He also covered IRA transfers and charitable strategies, the Donor Advised Fund, the new estate and gift tax rules, the new Opportunity Zone strategy, changes to the 529 rule, and changes to pass-through tax treatment. Along with the very informative and timely talk we received a handout that outlined this information and included several related articles.

Announcements

After the speaker, Kathy asked John to announce our upcoming fall programs:

October 16, 2018: Robert Connolly, Chief, GT Police Department (tentative)

November 13: Stephen Nowicki, Emory University Department of Psychology

December 4: Silver Jackets, Holiday Lunch at Petite Violette; more information will be available at the October meeting and in a MailChimp email to all SJ members.

Our next meeting is on Tuesday, October 16, at 11 am. It's a **NEW DATE** due to AROHE Conference. Also, it's a **NEW LOCATION** since it was necessary to move the meeting because the date was changed. It will be in the Crescent Room on the 2nd floor of the Stamps Commons attached to the Student Center.

Ron, John, and Kathy will participate in two statewide meetings this fall:

- USG Retiree Council meeting on Oct. 25- Ron is the Chair.
- GA-HERO meeting on Nov. 9.

Kathy thanked our speaker again and thanked everyone for their participation.

Respectively submitted,
Janis Goddard
Secretary