Conference Program

October 9, 2015 • Embassy Suites

Presented by

UNIVERSITY OF KENTUCKY
Human Resources
John A. Patterson, MD, MSPH, FAAFP is an integrative medicine physician and medical educator, board-certified in family medicine and integrative holistic medicine. He is a graduate of Vanderbilt University (BA), University of Tennessee (MD) and University of Kentucky (MSPH). He is past president of the Kentucky Academy of Family Physicians and practiced family medicine for more than 30 years in rural, medically underserved Estill County (Irvine) Kentucky.

Dr. Patterson is certified by the Center for Mind Body Medicine, Integral Yoga Institutes and Integrative Restoration Institute. He has completed supervision in Mindfulness-Based Stress Reduction through the Center for Mindfulness at the University of Massachusetts Medical Center.

He is on faculty at the University of Kentucky College of Medicine, the University of Louisville School of Medicine, Saybrook's School of Mind Body Medicine, Saybrook's School of Clinical Psychology and the Center for Mind Body Medicine (Washington, D. C.). He is the team leader for the Lexington Medical Society's Physician Wellness Program and teaches Mindfulness Based Stress Reduction for the UK Wellness Program.

His work with patients, students, and health professionals emphasizes a holistic perspective integrating mind, body, spirit, and our relationship with each other and the environment.

He operates the Mind Body Studio in Lexington, where he offers individual consultations and group classes emphasizing mindfulness-based integrative medicine and yoga therapy. Special interests include burnout prevention for helping professionals and stress management for those with chronic physical and emotional conditions. He also teaches Argentine tango as a uniquely transformative social skill, art form and movement therapy for enhancing emotional well being and managing mood and gait disorders.

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Janet Bandera, TIAA-CREF
Janet Bandera serves as a Director of Wealth Planning Strategies for TIAA-CREF, providing wealth transfer, estate and tax planning services for clients with the most complex needs. Based in Tampa, she works with clients in the Southeastern United States. Prior to joining TIAA-CREF, Janet was a nationally recognized attorney, author, lecturer and teacher working with families and business owners on estate and business succession planning. She was in private practice for 18 years and spent more than 10 years working directly with financial advisors and their clients.

Tina Cornett, UK Benefits
Tina Cornett has been an employee with the University of Kentucky for eleven years. During that time she has worked in various aspects of Human Resources/Employee Benefits. Tina was the first recipient of the Human Resources Achievement in Customer Service Excellence (Ace) Award. She has recently been promoted from her role as Retirement Officer to Corporate Systems Administrator/COBRA and Direct Bill Administrator. Although no longer meeting with retirees one-on-one, she will continue to provide excellent customer service by assisting retirees on the billing side of retiree benefits, as well as being instrumental in assisting with the transitioning process to Medicare.

Matt Haas, TIAA-CREF
Matt Haas is a Relationship Manager in the Southeast Region within TIAA-CREF’s Institutional Client Services. In this role he is responsible for orchestrating the coordination of all consultative services, product and solution delivery, plan investment expertise, communications, and operational and technology support. A graduate of the UK Gatton College of Business and Economics (BA) and the Bellarmine University Rubel School of Business (MBA), Matt has been with TIAA-CREF for 12 years and has more than 14 years of experience in the financial services industry. Prior to joining TIAA-CREF, he was with the Integrity Life Insurance Companies, a subsidiary of Western Southern Life.

Terri Kanatzar, UK Benefits
Terri Kanatzar, an employee of the University of Kentucky for 17 years, is a Retirement Officer in the Human Resource/Benefits Department. Terri verifies retirement eligibility and conducts individualized retirement planning sessions, making sure the retiree has a complete and total understanding of his/her benefits. Prior to her current role, Terri served as the Coordinator for the Work-Life Elder Care Program. Terri earned her Master’s Degree in Social Work from the University of Kentucky.
Todd Macaulay, UK Benefits
Todd Macaulay is a Certified Financial Planner and an Accredited Investment Fiduciary and has been working in financial services for more than 15 years. He's worked for companies such as Fidelity Investments and John Hancock and small advisor offices affiliated with Raymond James and Commonwealth Financial. As an employee of the University of Kentucky, Todd is now working to create a Financial Well-Being program to help employees take control of their financial situation and reach their financial goals.

Chris Perry, Fidelity
Chris Perry joined Fidelity as a workplace planning and guidance consultant in 2012. An investment advisor representative, registered securities representative, and licensed insurance representative, Chris holds a bachelor’s degree in business administration and finance, with a minor in economics, from the University of Kentucky.

Lyman “Russ” Russell, Social Security Administration
Lyman “Russ” Russell began his career with the Social Security Administration in July 1990 in Lynchburg, Virginia as a claims representative. During his 24 year career, he has also worked in Corbin and Maysville, Kentucky and here in Lexington as an Operations Supervisor, Branch Manager, Assistant District Manager, and now as the Lexington District Manager. The Lexington SSA district includes nine counties served by the Lexington office and four south central counties served by the Richmond SSA office.

Lucy Wells, UK Benefits
Lucy Wells received a BS degree in pharmacy from the University of Kentucky and has extensive community pharmacy experience. She has served as the Prescription Benefit Manager at UK since September 2008 and as the Clinical Director for the Know Your Rx Coalition since its inception in July 2011. She provides strategic direction, monitors clinical programs, and optimizes cost management for the pharmacy benefits for each coalition participating employer, covering approximately 110,000 people.
Check-In and Continental Breakfast ................................................................. 8:30am - 9:00am

What Can I Expect from Social Security? .............................................................. 9:00am - 10:15am
Russ Russell, Social Security Administration冷溪厅堂 III

Break - Visit Exhibitors...................................................................................... 10:15am - 10:30am

Breakout Sessions ................................................................................................. 10:30am - 11:30am
From Here to Retirement (TIAA-CREF) Coldstream Ballrooms I & II
Matt Haas and Janet Bandera, TIAA-CREF

Navigating Your Retirement Plans (Fidelity) Coldstream Ballrooms IV & V
Chris Perry, Fidelity

Break - Visit Exhibitors...................................................................................... 11:30am - 11:45am

Lunch .................................................................................................................. 11:45am - 1:00pm
Benefits of Living Mindfully Before and After Retirement Coldstream Ballroom III
John A. Patterson, MD, MSPH, FAAFP, UK College of Medicine

Break - Visit Exhibitors...................................................................................... 1:00pm - 1:15pm

Breakout Sessions ................................................................................................. 1:15pm - 2:20pm
UK Retirement Procedures Coldstream Ballroom III
Tina Cornett and Terri Kanatzar, UK Benefits

Mindfulness Tools for Managing Stress and Cultivating Happiness Coldstream Ballrooms I & II
John A. Patterson, MD, MSPH, FAAFP, UK College of Medicine

Break - Visit Exhibitors...................................................................................... 2:20pm - 2:30pm

Breakout Sessions ................................................................................................. 2:30pm - 3:30pm
Financial Wellness Coldstream Ballroom III
Todd Macaulay, UK Benefits

Getting the Most Out of Your Pharmacy Benefits Coldstream Ballrooms IV & V
Lucy Wells, UK Benefits
Exhibitors

AARP
Donovan Fellowship for Academic Scholars
Fidelity Investments
iTNBluegrass
Lexington Senior Center
The MPM Group, LLC
Osher Lifelong Learning Institute at UK
Sanders-Brown Center on Aging
Social Security Administration
TIAA-CREF
UK Career Development
UK Benefits
UK Federal Credit Union
UK Wellness
UK HealthCare Volunteer Services
UK Training & Development
UK Women’s Club
UK Work-Life

Planning Committee

Gail Carbol
UK Benefits
Erika Chambers
UK Work-Life
Lisa Collins
UK Work-Life
Terri Kanatzar
UK Benefits
Diana Lockridge
OLLI at UK
Ward Suthon
UK Human Resources
Terri Weber
UK Elder Care

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