



Membership news

Time for renewal?

● Check your TI Alumni Association membership date online at www.tialumni.org. Just click on the home page "Renew Member" link.

Thinking about joining?

● Stay connected with the TI family. Membership is open to TI retirees and their spouses, as well as former TI employees. See the TI Alumni website or call 972-995-8393.

See insert in this newsletter for a membership form and details about the benefits of joining TIAA.

TI names new CEO

● Rich Templeton will become TI president and chief executive officer effective May 1. He will succeed Tom Engibous, who will continue as TI chairman.

The transition is a planned succession that follows Rich's selection as chief operating officer in 2000 and his election to the board of directors in 2003. Rich is a former TI Semiconductor Group president.

Tom became president and CEO in 1996 and was named chairman in 1998.

● Tour of the grounds included in May 19 activities.

The TI Alumni Association's 2004 annual meeting will be at 1 p.m. May 19 in the newly completed Rosine Hall at the Dallas Arboretum, 8617 Garland Rd.

TIAA members will elect officers for 2004-2005, vote on bylaws changes and hear a Texas Instruments executive give an update on the company's business.

"One of the event highlights will be the opportunity to tour the beautiful grounds prior to the meeting," said Jerry Brandenburg, TIAA president. "The Dallas Arboretum is one of the most magnificent gardens in the nation and is ablaze with color year-round."

The fragrant gardens and lush lawns — overlooking White Rock Lake and Downtown Dallas — also feature intriguing sculptures, sparkling fountains and the historic DeGolyer and Camp mansions.

The DeGolyer house was the home of the legendary oilman Everette Lee DeGolyer. He was the silent partner who backed Geophysical Service Inc. when GSI was formed in 1930. GSI was the original company from which TI evolved.

The TIAA Activities Committee announced that TIAA will provide

TIAA annual meeting set at Dallas Arboretum



The fern grotto at the Dallas Arboretum is among the many breath-taking sights that can be seen there. The TIAA will have its annual meeting at the arboretum on May 19.

vide buses to the annual meeting for a nominal fee. Buses will leave the Dallas Texans Activity Center at 10 a.m. and return at 3 p.m.

Meeting attendees will get free parking and admission to the Arboretum. Refreshments will be served.

"Prior to the meeting, you may

ride the shuttle around the Arboretum grounds, bring a picnic lunch or eat at the Dining Terrace or the Indian Room Restaurant, which will open in March prior to the meeting," Jerry said.

Invitations, proposed bylaws changes and a map will be mailed

to TIAA members by mid-April. TI retirees who are not TIAA members may attend and join the association at the registration desk. The activities will conclude by 2:30 p.m. For further information, call TIAA, 972-995-8393.



Ida Hassler collects survey questionnaires at the TI retiree Big Event.

Survey says ... What you liked in 2003, and what to expect at 2004 Big Event

By Ed Hassler

It seems like only yesterday we were together in Market Hall for the 2003 TI retiree Big Event, which was held Nov. 12. We learned a number of things, and will make changes for the 2004 event, tentatively set for Tuesday, Nov. 9.

Here is what we plan to do this year, based on survey feedback from the last event:

● The event site, Market Hall, is a good venue for us. Twenty percent of the survey respondents want to try another venue, preferably in Dallas' northeast quadrant. However, few places in the Dallas area can handle an event as large as ours. We are looking

elsewhere, but have not found a place with the needed contiguous space available at significantly less cost in the time frame.

● At the 2004 event, the signs for GSI, DSEG and other TI groups will be hung over the luncheon tables, and this will serve as both the dining area and the gathering area.

● Seating in the dining area will be open when guests arrive. The tables will be numbered. Service from the buffet will be by table groups to reduce the amount of time spent waiting in line.

● The luncheon menu is being reviewed. The possibility of a

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ALUMNI NEWS

CALENDAR

April

1 — Senior Connection support group for job seekers 50+. Topic is "Resume Do's and Don'ts." 10-11:30 a.m., The Senior Source, 1215 Skiles St., Dallas. RSVP required. Call 214-823-5700.

3 — Chamber Music International concert in Caruth Auditorium, Southern Methodist University. Program combines German and Hungarian romanticism, Czech humor and American jazz. TIAA has arranged for a 20 percent ticket discount and will have buses available. Call TIAA, 972-995-8393 for details.

10 — TI Reunion Club Breakfast, 10 a.m., Denny's Restaurant on Motor St. Call Gladys Jones, 214-376-9725, or Fannie Rose, 214-352-1978.

15 — Senior Connection support group for job seekers 50+. Topic is "Getting the Most Out of a Job Fair." 10-11:30 a.m., The Senior Source, 1215 Skiles St., Dallas. RSVP required. Call 214-823-5700.

20 — Texins Retiree Club, 10 a.m., Dallas Texins Activity Center. Covered dish lunch, with music from the Farmers Branch Ukulele Band. Bring a favorite dish to serve an extra 15 band members. Call Tom Gregory, 972-412-9332.

May

8 — TI Reunion Club Breakfast, 10 a.m., Denny's Restaurant on Motor St. Call Gladys Jones, 214-376-9725, or Fannie Rose, 214-352-1978.

18 — Texins Retiree Club, 10 a.m., annual fish fry at Huffines Park, Richardson. Fried catfish, baked beans and iced tea will be provided. Bring a covered dish. Event will be in covered pavilion at N. Plano Rd. and 1500 Apollo Rd. Call Tom Gregory, 972-412-9332.

19 — TI Alumni Association Annual Meeting, 1 p.m., Rosine Hall, Dallas Arboretum, 8617 Garland Rd. Call TIAA, 972-995-8393.

June

5 — Komen "Race for the Cure" 5K Run/Walk in Plano. Help raise money to fund the cure for breast cancer. To join the TI Team, contact Rebecca Cooper, 972-995-8462.

12 — TI Reunion Club Breakfast, 10 a.m., Denny's Restaurant on Motor St. Call Gladys Jones, 214-376-9725, or Fannie Rose, 214-352-1978.

15 — Texins Retiree Club, 10 a.m., Dallas Texins Activity Center. Covered dish lunch, with chicken dishes provided. Bring a favorite dish. Rose Mary Rumbley, actress, author and speaker will entertain with a presentation entitled "Celebration." Call Tom Gregory, 972-412-9332.

TI-ALUMNI CONNECTED

The TI-Alumni edition of *Connected* is sponsored by the Communications Team of the TI Alumni Association. The Alumni edition's goal is to help foster and maintain a sense of community among the retirees of Texas Instruments.

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Retirees interested in contributing to the publication should contact any member of the Communications Team.

The TI Alumni Association is funded in part by TI Human Resources, under the direction of the TI Public Affairs organization.

Get ready to hit the road with TIAA

The TI Alumni Association will sponsor two European tours commemorating the 60th anniversary of the World War II D-Day invasion.

The May 25-June 10 Image Tours WWII Anniversary tour begins in Amsterdam and ends in Paris. The itinerary includes visits to war sites and other points of interest in Holland, Germany and France. Visitors will spend three nights at the Normandy beaches and two nights in Paris. The \$3,290 per-person price includes airfare from Dallas/Fort Worth, 24 meals, hotels, ground transportation and entrance fees.

The June 2-12 cruise on Holland America's Noor-dam sails roundtrip from Dover, England, with port calls in the Channel Islands, France and Holland. Optional excursions are available to the Normandy beaches. Cruise prices start at \$1,465 per person and do not include airfare, transfers or excursions.

Payment in full is due immediately for both D-Day tours. Contact Kathleen Humphrey, 972-675-0832.

A bus tour July 9-10 to Palo Duro Canyon features a performance of "Texas," a musical drama, at the Pioneer Amphitheater in Palo Duro Canyon State Park. The trip package includes a backstage tour, barbecue dinner, cowboy breakfast, Texas museum visit, hotel and baggage handling. The total cost is \$195, with a \$25 deposit due now. The bal-

ance can be paid out monthly, with final payment due June 10. Contact Eddie Vernon, 972-438-2800.

Paddlewheel cruises in the Pacific Northwest are offered Oct. 9-16 or November 6-13 on the America West Steamboat Company's Queen of the West. The itinerary on the Columbia, Snake and Willamette Rivers includes visits to sites along the Lewis and Clark route and the Oregon Trail and transits of many locks. Cruise prices are \$3,014 per person for the Oct. 9 departure and \$2,316 per person for the Nov. 6 departure. These prices include the cruise, all shore excursions and gratuities but do not include airfare. A \$300-per-person deposit, plus optional insurance, is due by April 1. Contact Kathleen Humphrey, 972-675-0832.

In late March 2005, TIAA will sponsor a Collette Tours American Heritage trip beginning in New York and ending in Washington, DC. Travelers will visit the Amish district, Philadelphia and Gettysburg, PA; Williamsburg, Monticello and Mount Vernon, VA; and see the cherry blossoms around the Tidal Basin in Washington. The \$1,875 per-person tour price, based on double occupancy, includes airfare from Dallas/Fort Worth, ground transportation, hotels, 13 meals and entrance. Single pricing is also available. A \$200 per-person deposit, plus optional insurance, is due by Sept. 1, 2004. Contact Kathleen Humphrey, 972-675-0832.

Where to call

Save this reference list of useful phone numbers for TI and TI-Raytheon retirees.

TI Health and Financial Benefit Plans

1-800-890-2600 TI SmartLink. Consolidates all benefit phone numbers into voice recognition 24-hour telephone system. To talk to TI Benefits Center representative Monday - Friday 8:30 a.m. to 4:30 p.m. Central Time, enter or speak your Social Security number, select TI Benefits Center item from menu and then enter your Hewitt password. Or you can direct dial service providers at the following numbers:

1-888-377-7896 — Employee Stock Purchase Plan Service Center - Computershare.
1-800-888-2273 — Employee Assistance Program - Magellan.
1-866-866-2300 — Blue Cross Blue Shield (BCBS) PPO Plan (www.bxbstx.com/members).
1-800-557-5749 — AdvancePCS Pharmacy (www.advancercx.com).
1-800-781-6877 — CareEnhance Nurse Advice (offered by AdvancePCS).
1-800-942-0854 — MetLife Dental Basic/Dental Plus.
1-800-772-1416 — Aetna DMO.
1-800-422-4234 — DeltaCare DHMO, Main Number.
1-800-424-1155 — Vision One Eye-Care Discount Program.
1-877-719-9860 — HFC LivingFree Smoking Cessation Program.
1-800-633-4227 — Medicare benefits and claim status.
1-800-888-9560 — PNT nutrition counseling. (In Dallas area, call 972-238-1811.)
1-800-597-7516 — UBS Financial Services (Stock Options).
1-800-981-8676 — Computershare Investor Services (TI Stock Accounts)

You may also access Your Benefits Resources (YBR) website via TI Alumni website at www.tialumni.org. (Social Security number and password required for logon to YBR).

Raytheon Health Benefit Plans

(TI-Raytheon Systems retirees should have your Social Security number and personal identification number available when you call.)

1-800-358-1231 — Raytheon Benefits Center.
1-800-638-8884 — United Health Care (www.myuhc.com).
1-800-559-4244 — Wausau Benefits Medicare Plus Plan (www.wausaubenefits.com).
1-800-866-7008 (1-800-842-9489 TDD) — 24-Hour Employee Assistance Program (www.liferesourcesray.com).
1-800-424-3803 — Mental Health North Texas Area (Non EAP - Magellan).
1-800-864-1431 — Prescription Services (www.medcohealth.com).
1-800-754-8407 — Disease Management Services.
1-800-877-7195 — Vision Service Plan (www.vsp.com).
1-888-262-4877 — MetLife Dental Customer Service.

Texins Retiree Club (Dallas area)

972-242-3939 — Lucy Salas, president, and
972-412-9332 — Tom Gregory, vice president, have information on activities, dues and meeting schedule.

TI Alumni Association

972-995-8393 — Main number for TIAA. (Or visit website at <http://www.tialumni.org>.) Also call for questions about quarterly newsletter *TI Alumni Connected*.
972-279-4075 — Jerry Brandenburg, president, has information on membership dues and activities.

ALUMNI NEWS

700 attend TI retiree benefits seminar

Some 700 retirees packed Plano Centre Feb. 10 for a TIAA-sponsored seminar on coordination of retiree medical benefits between Blue Cross Blue Shield and Medicare.

This is a high-interest topic for TI retirees approaching or past age 65, when Medicare becomes the primary health insurer and the BCBS Preferred Provider Organization (PPO) plan is secondary.

The BCBS coordination of benefits (COB) provision is different for individuals who retired prior to 1988 and those who retired on or after Jan. 1, 1988. Therefore, COB issues were covered in separate seminar sessions for pre-1988 and post 1988 retirees.

Jerry Pierce, TIAA Ongoing Education vice president, welcomed the panelists — Martha Vaughn representing TI; Sandra Mason, Medicare; and Siri Spradling, BCBS.

Retired Tler Martha Vaughn, now working on contract with the TI Health Benefits organization, and Melanie Reuler, TI Total Compensation and Health Benefits communications manager, are bringing together a new TI Retiree Health Benefits Interest Group.

TI-HBIG will be a sounding board for the TI Health Benefits organization and will provide input on how communications for benefits offerings and changes will be presented to retirees. Also, TI-HBIG will help in the planning of retiree focus groups facilitated by

Hewitt & Associates, the TI benefits administrator.

Sandra Mason said the “Medicare & You 2004” handbook, mailed to all Medicare recipients, gives most important information about Medicare benefits. Anyone with questions can visit the Medicare website, www.medicare.gov, or call 1-800-MEDICARE (1-800-633-4227).

“Just hit zero, and that will get you to a live person,” Sandra said.

Siri Spradling said a retiree on Medicare must initially file claims with Medicare. She said, “You can’t file a claim directly with BCBS that has not been processed by Medicare.”

She advises retirees with claims questions to contact BCBS customer service. “We will be happy to walk through the claims process with you,” Siri said.

Retirees can reach BCBS customer service representatives either through the TI SmartLink number, 1-800-890-2600, or by calling BCBS directly at 1-800-866-2300.

The 2004 Retiree Health Benefits Guide, mailed out in February, summarizes the extended health benefits coverage available for qualified TI retirees and their eligible dependents and qualified dependents of deceased retirees. To read a description of how COB is determined, see Page 41.

Retirees can view the BCBS-Medicare COB seminar slides and listen to the presentations on the TIAA website at www.tialumni.org/new/bcbs-medicare.asp.



All aboard

TIAA members took a bus trip Dec. 8 to see the Christmas lighting ceremony at Farmers Branch. Pictured are Jerry and Ronnie Brandenburg (holding granddaughter, Lauren Hagwood), Kay Abrams, Richard and Mary Robinson, Grace Alvarez, Jimmie Roberts, Peggy Green, Jo and Randy King, John and Lolita and Mack Green, Mary Anne Harris, and Doris Mott. Not shown is Ruth Lee, a volunteer at the ceremony, who did not ride the bus.

TIAA members can access Infolink online

TI has a new internal online newsletter, Infolink, which replaces the online Connected. Infolink will continue to cover TI businesses and the people who make it all happen. Content is updated nominally on a monthly basis and posted on the TI Alumni Association website.

Because of content sensitivity, Infolink and prior internal online Connected issues are now in the TIAA members-only, password-protected

section of the website. Login as a TIAA member is required to access this material at www.tialumni.org/connected/link.htm.

All retirees can still read TI Alumni *Connected*, the quarterly TIAA newsletter, on the website. TIAA will keep distributing the printed alumni newsletter, as many TIAA members do not have Internet access.

Ralph Doshier: In TI for the long haul

By Ed Millis

Nobody can accuse Ralph Doshier of being a job hopper. On June 1, 1951, he began his career with Geophysical Service Inc. — soon to become Texas Instruments. Today, he still works at TI, where he is the undisputed champion of TI longevity.

A native Dallasite, Ralph graduated from Woodrow Wilson High School and entered North Texas Agricultural College (now the University of Texas at Arlington), to study engineering. His studies were interrupted when he joined the Naval Reserve and was called to active duty in 1943.

The Navy, recognizing a bright young fellow, sent Ralph first to SMU and then to Columbia to continue his engineering education and officer training. He was commissioned in March 1945 and served until discharged in June 1946.

He soon met an attractive young lady, Anna Bramlett, and they were married May 1, 1948. The family count now is two daughters and four grandchildren.

Ralph returned to SMU and finished his mechanical engineering degree in 1947. Then, he went to work for Lone Star Gas. Insufficiently challenged for probably the only time in his life, Ralph took on a night job with

geophysicists DeGolyer and MacNaughton.

On such things, life paths are permanently diverted. For when Ralph tired of the service work at Lone Star, Lewis MacNaughton suggested he check out an up-and-coming electronics manufacturing company called Geophysical Service Inc. Ralph had never heard of GSI, and neither had anybody else — yet.

Ralph’s first job was on a chart recorder for Navy antisubmarine equipment. As he delved into the world of “real engineering,” Ralph realized more education would be useful. So he went back to SMU at night, completing a master of science in electrical engineering in 1956. He got not only an advanced degree, but in another field.

After Ralph was promoted to assistant chief engineer, he and his growing family moved to the new TI-owned Houston Technical Laboratories. Ralph put away his slide rule and began the meat and potatoes part of his career — management and staff activities.

Ralph moved into corporate-wide activities as his talents and hard work were recognized by the managers. He is living proof of Pat Haggerty’s maxim, “The reward for a job well done is a

harder job.” Fortunately, he flourished under this frequently career-fatal “reward system.”

He developed — and at various times managed — World-wide Strategic Planning, the OST system, Advanced Planning, and Long Range Planning. Whether Ralph planned for this or not, his life was now full swing in guiding the future structure of TI. The TI Orientation, Continuing Technical Education, and other programs were also under Ralph’s competent management.

In March 1989, he retired from TI and moved into a new and challenging field—working with the Dallas Independent School District. Along with retired TI Vice President Jim Fischer, he began working on an educational task force for TI President, Chairman and CEO Jerry Junkins.

Ralph never left his office when he retired. He just took off his TI employee hat and put on his TI consultant hat. Ralph began his “retirement” working for an awesome collection of bosses—TI, the TI Foundation, Dallas Citizens Council, and the Greater Dallas Chamber of Commerce.

Their first priority was education, and the results were incredible. The story of the Julia Frazier Elementary School, a kindergarten



Long-time Tler Ralph Doshier continues to work for TI as a consultant.

through third grade school in a disadvantaged neighborhood, depicts the emergence from darkness into the light. The school moved up from the lowest-ranked elementary school in the district to a state rating of “exemplary” in 10 years. *Texas Monthly* magazine ranked Frazier in the top five K-3 low-income schools in the state.

“The biggest thing I found was that, regardless of home environment, children can excel,” he says enthusiastically. “The main thing is having a dedicated principal and teachers. Give them a method of teaching and the tools to implement it, and it works.”

It’s a great success story, and resulted in Ralph receiving the prestigious “Unsung Hero” award in 1995 — a small award for a

huge achievement. The system that Ralph and Jim implemented at Frazier is beginning to be fanned out across all of DISD.

He still recalls his best boss — Chester Nimitz.

“He was such a straight shooter and approachable. We just hit it off. I had a great time working with him in the Houston plant.” In his “spare” time, Ralph has written four books, about his family, work, and church. He homeschooled several grandchildren in algebra, just to keep his finger in teaching.

Jim Fischer describes Ralph as: “A truly unique individual and a gentleman” — a nice combination.

ALUMNI NEWS

TIAA — Charting the future

By Hector Cardenas

By all measures, TI is recognized as a great place to work — an employer of choice. Retiring TIers join an ever-growing community, and employees today retire younger and live longer.

Many TI retirees lead active lifestyles, going back to work in other industries, serving the community in volunteer and leadership roles or pursuing family activities, personal projects, and extended travel. TI retirees will always make a difference to the community where they live, work and play.

Recognizing the need for retired TIers to stay in contact with both TI and other retired TIers, the TI Alumni Association was chartered in the year 2000 under the sponsorship of the TI Community Affairs Office.

TIAA undertook three major activities — planning and coordinating the annual retiree event, creating and producing the TI Alumni newsletter and developing and maintaining the TI retiree website, www.tialumni.org.

The Big Event, a primary networking opportunity for many retirees, serves as a forum for TI management to provide a TI business update to retirees. This year, a number of health services were offered. Attendance totaled 1,300, with approximately 35 percent from outside the Metroplex.

John Byers, volunteer webmaster and TIAA membership vice president, recently redesigned the website to make it easier to use and give retirees access to TI information that is normally available only to active employees due to security concerns. All topics are listed in one of the four website categories: Activities, News, Benefits and Members.

TIAA provides a variety of services and activities to the TI retiree community. The

Communications committee produces the quarterly TI Alumni *Connected* newsletter.

The Ongoing Education committee presents quarterly seminars on health/benefit plans, financial planning and other topics of retiree interest. The Activities committee organizes group travel and community social events and activities to bring retirees together. The Membership committee recruits TIAA members and actively maintains and updates the TI retiree mailing lists. Many TI retirees participate and benefit from these TIAA-sponsored activities.

Note: TIAA retiree mailing list updates are given to Hewitt but Hewitt will not make any changes in the TI mailing list without independent verification. To keep your mailing address current for material from TI, you must change both your Hewitt record and your TIAA record.

The TIAA executive team has initiated a strategic plan for the future that would increase the services offered, implement a more effective retiree communications process and, where possible, expand communications to other sites outside the Dallas area. The true measure of the plan's success will be TIAA membership growth and greater participation at TIAA activities.

Communication improvements designed to make more information available to retirees without their need to travel were beta tested in the health benefit seminars in 4Q03 and again in 1Q04. Retirees can view the videotape of the seminar on 2004 health benefit changes on the Internet at www.tialumni.org/new/benef2004.asp. The 1Q04 health benefits Medicare Coordination with BCBS is available at www.tialumni.org/new/bcbs-medicare.asp.

Another recently beta tested communica-

tions enhancement is the live viewing of seminars through a TI Internet connection using WebEx. This capability allows the simultaneous transmission and viewing of the seminar on the Internet at home or from a remote location. The recent Medicare Coordination with BCBS was provided live using WebEx for those TI retirees who were not able to, or chose not to, attend in person. Future seminars may be planned using WebEx if it is deemed beneficial to TI retirees. This capability also allows the transmission to TI retirees at sites outside Dallas. Retirees in Houston used this system as the beta site for the 4Q2003 seminar and were pleased with the result.

TIAA recognizes that, long-term, nearly all communications will migrate to softcopy or web-based communications such as e-mail or the use of the TIAA website for posting events, dates and information. However TIAA plans to exercise caution to insure that the use of electronic communications does not adversely impact contact with the diverse base of TI retirees. Seventy-eight percent of the respondents to the last survey had Internet access. Printed materials, especially events announcements, will continue to be used while the demand exists and funds are available.

Change is often difficult, but TIAA recognizes that many changes will be necessary to grow in both the quality and quantity of services and the number of TI retirees served. As the strategic plan is defined, all TI retirees will be notified of changes through e-mail, the TI Alumni newsletter and through the TI website to both inform you and to solicit your feedback of how we can better meet the needs of those who TIAA serves—the TI retiree community.

SURVEY

From Page 1

multi-item menu including barbecue is under consideration.

The exhibit area will be expanded, and we will try to entice exhibitors from TI and those whose products use TI products to attend.

- The medical testing area also will be expanded. The use of our new additions exceeded expectations. We will probably add bone density testing and other tests that can be done in an "office environment."

- The presentation area will be located to minimize interference with other activities requiring a public address system. There probably will be more than one presentation area to provide a more open schedule which will allow is to present more topics, and likely will be more commercial presentations if there is demand for them.

Some things that were new in 2003 will be continued:

- The bus service from the Dallas Texins building was a success. Two buses were required. This will be provided next year.

Valet parking specifically for the event was also popular and will be provided again. More than 80 cars were parked.

For those who like numbers:

- 680 surveys were submitted.

- 1,300 people ate lunch, and drank 103.5 gallons of coffee.

- 98 percent liked the event.

- 94 percent liked the exhibits.

- 91 percent think TIAA is of benefit to them. Note that since 65 percent of attendees were members, non-members also feel the TIAA is of benefit to them. Why not join?

- 55 percent like the new TIAA website, but 43 percent do not have access.

- 61 percent think the web site content is of value, but 37 percent have not looked at it.

The questionnaire was relatively completely answered. The lowest response on any question was 66 percent; the highest response on any question was 98 percent; and 89 percent of the respondents answered more than one-fourth of the questionnaire.

Your committee worked hard but had a great deal of fun providing this event for you. We are all ready to do it again! Planning for the 2004 event is well along. We are excited about the success of 2003 and are looking forward to a bigger and better event in 2004.

Hassler named to city commission

Ed Hassler, TI Alumni Association executive vice president, will serve on the Richardson Parks and Recreation Commission. The City Council appointed Ed to a two-year term ending Dec. 1, 2005.

Sponsors sought for TIAA Golf Tournament

The TIAA committee planning the 2004 charity golf tournament needs help from retirees who can suggest potential sponsors.

Max Post, TIAA past president, said the committee is reviewing proposals from three golf courses and plans to make a selection in the next few weeks. The tournament will be held in the September or October.

Please send sponsor recommendations, with the contact name and phone number, to admin@tialumni.org or call the TIAA office, 972-995-8393.

As soon as the location and date is pinned down, the information will be posted on the TIAA web site.

Wills, probate explored at TIAA seminar

By Dot Adler

Wills and the probate process were demystified at a recent TIAA seminar conducted by Tod Almquist, a Dallas attorney who specializes in estate planning. Approximately 150 retirees attended the Ongoing Education committee event at Plano Centre.

Probate is the procedure in which it is determined that an individual is dead and has left a valid will. "In Texas, if an independent executor is designated in the will, the probate procedure is simple," he said. "The process is much more complex if a will does not designate an independent executor."

How probate works

The independent executor brings the original of the will to an attorney, who prepares the application for probate. This is taken to the probate court in the county where the deceased person lived, and the court filing fee (\$191 in Dallas County) is paid.

On the first Monday, 10 days after the filing date, the executor is eligible to have a hearing in probate court. "This takes only a few minutes, and the will then is admitted to probate," the attorney said.

The independent executor is entitled to letters testamentary for the estate, permitting the executor to go to the deceased person's bank, credit union, brokerage, etc., and change the name on accounts. The executor has 120 days to file an inventory of the individual's assets listing their value. This does not have to be in great detail.

"The independent executor is not under supervision of the probate court," the attorney said. "You never go back to probate court again." Although the executor has four years to probate a will, the whole procedure could be wrapped up in a couple of weeks.

Why a will is needed

The purpose of a will is to transfer ownership of assets. The will must designate clearly in writing where the deceased wants these assets to go.

In Texas, any assets acquired during marriage are community property except what is acquired through gift or inheritance. Each spouse owns half

of the community property. Property acquired before marriage is separate property, not community property.

If a person dies without a will, the state decides where the assets go.

"It's a good idea to review your will every five years," the attorney said. "You need to know where the original of your will is. Keep the will in a safe deposit box. If you can't find your will, you should consider having a new will drawn up."

Other important documents

In addition to writing a will, retirees should get a lawyer to prepare a durable power of attorney, a medical power of attorney and a living will. These documents should be kept in a safe place at home.

With a durable power of attorney, a person designates someone to manage to manage his or her financial assets in the event of incapacity such as Alzheimer's disease. If an individual is of an age when his or her spouse might become incapacitated, secondary power of attorney can be given to an adult son or daughter.

A medical power of attorney appoints an individual who can authorize medical procedures if a person is not able to do this for himself/herself.

A living will can give instructions to doctors not to resuscitate if a person is terminally ill.

Avoid living trust scam

The attorney advises retirees not to set up a living trust. "In Texas, all this does is avoid a simple procedure — probate — that doesn't cost very much," the attorney said. "People with gray hair are targets of this scam, which in this state is consumer fraud."

If an individual owns property in another state, a brief probate procedure will be necessary in the other state.

Retirees can direct questions to Tod Almquist at 972-458-2161.