

# 2020 Retirement Planning Seminar

Monday, November 9 – Tuesday, November 10

## MONDAY, NOVEMBER 9

10:45 a.m.

**WELCOME, COMMUNITY GATHERING**

11:15 a.m. – 12:45 p.m.

**CONCURRENT SESSIONS:**

**Financial Aspects of Retirement (Group A)**

*Presenter:* Geri Allard, Virtual Education Consultant – Fidelity Investments

**Beyond Dollars: Thriving in the New Retirement (Group B)**

*Presenter:* Helen Dennis – Specialist on Aging, Employment & the New Retirement

12:50 – 1:35 p.m.

**EAST COAST LUNCH & CONVERSATION CAFÉ**

- Informal Networking
- Fidelity NetBenefits Demo & Q&A with Sean Carson – Retirement Specialist, Fidelity Investments
- RPB Open Q&A

1:40 – 3:10 p.m.

**CONCURRENT SESSIONS:**

**Beyond Dollars: Thriving in the New Retirement (Group A)**

*Presenter:* Helen Dennis – Specialist on Aging, Employment & the New Retirement

**Financial Aspects of Retirement (Group B)**

*Presenter:* Geri Allard, Virtual Education Consultant – Fidelity Investments

## DAILY SCHEDULE

# 2020 Retirement Planning Seminar

Monday, November 9 – Tuesday, November 10

### MONDAY, NOVEMBER 9

3:15 – 4:00 p.m.

#### **WEST COAST / MIDWEST LUNCH & CONVERSATION CAFÉ**

- Informal Networking
- Open Q&A with Helen Dennis – Specialist on Aging, Employment & the New Retirement
- RPB Open Q&A

4:00 – 5:30 p.m.

#### **CONCURRENT SESSIONS:**

##### **Transitioning to Retirement for Clergy**

*Presenters:* Rabbi Cindy Enger – Director of Rabbinic Placement, CCAR  
Rabbi Donald B. Rossoff – Rabbi Emeritus, Temple B'nai Or

##### **Transitioning to Retirement for Educators, Executive Directors, and Others**

*Presenter:* Sharon Morton – Retired Educator, RJE

5:30 p.m.

#### **DAILY WRAP FOR ALL ATTENDEES**

## DAILY SCHEDULE

# 2020 Retirement Planning Seminar

Monday, November 9 – Tuesday, November 10

### TUESDAY, NOVEMBER 10

10:45 a.m.

#### MORNING SERVICE

*Leader:* Rabbi Stacy Offner – Temple Beth Tikvah

11:20 a.m. – 12:50 p.m.

#### SOCIAL SECURITY AND HEALTHCARE

*Presenter:* Geri Allard, Virtual Education Consultant – Fidelity Investments

12:55 – 1:05 p.m.

#### BREAK

1:05 – 2:00 p.m.

#### COMMUNITY GATHERING SESSION (AND EAST COAST LUNCH)

##### Plan for the 21st Century Retirement

*Presenter:* Steve Vernon – Founder & President, Rest-of-Life Communications & Research Scholar – Stanford Center on Longevity

2:05 – 2:15 p.m.

#### BREAK

2:15 – 3:30 p.m.

#### NEGOTIATING YOUR RETIREMENT CONTRACT FOR CLERGY

*Presenter:* Michael Gan – Partner, Peer, Gan & Gisler LLP

3:30 – 4:15 p.m.

#### WEST COAST / MIDWEST LUNCH & CONVERSATION CAFÉ

- Informal Networking
- Open Q&A with Michael Gan – Partner, Peer, Gan & Gisler LLP
- Fidelity NetBenefits Demo and Q&A with Sean Carson – Retirement Specialist, Fidelity Investments

4:15 – 5:30 p.m.

#### WORKING WITH RPB IN RETIREMENT

*Presenters:* Michael Kimmel & Robert Perry – RPB

5:30 – 5:45 p.m.

#### CLOSING REMARKS