

2024 Retirement Planning Seminar

Sunday, June 2 – Tuesday, June 4

Renaissance Denver Downtown City Center

All sessions will held in the Dignity/Endurance Ballroom, unless otherwise noted.

SUNDAY, JUNE 2

12:00 p.m.

REGISTRATION

Location: Dignity/Endurance Foyer

1:00 – 1:45 p.m.

WELCOME, INTRODUCTIONS, AND SEMINAR OVERVIEW

1:55 – 4:15 p.m.

(includes 15-minute break)

BEYOND DOLLARS: THRIVING IN THE NEW RETIREMENT

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

4:15 – 4:30 p.m.

SESSION BREAK

4:30 – 5:30 p.m.

CONTRACTS FOR CCAR PARTICIPANTS AND SPOUSES

Presenters: Michael Gan – Partner, Peer, Gan & Gisler LLP
Deborah Bogoslaw – Senior Associate, Peer, Gan & Gisler LLP

6:30 – 7:00 p.m.

MA'ARIV SERVICE

Location: Hoyt

Leader: Rabbi Steven Kaye – Temple Or Chadash, Denver, CO

7:00 – 9:00 p.m.

DINNER FOR ATTENDEES AND GUESTS

9:00 p.m.

INFORMAL NETWORKING

Location: True's Corner (located in the hotel lobby)

DAILY SCHEDULE

2024 Retirement Planning Seminar

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MONDAY, JUNE 3

8:15 – 8:45 a.m.

DAILY WELCOME AND BREAKFAST

8:45 – 9:15 a.m.

MARKET UPDATE

Presenter: John Merritt – Vice President & Investment Strategist,
Fidelity Investments

9:30 – 11:30 a.m.

(includes 15-minute break)

FINANCIAL PLANNING FOR RETIREMENT

Presenter: Dennis Gump – Workplace Financial Consultant, Fidelity
Investments

11:30 a.m. – 12:00 p.m.

FIDELITY NETBENEFITS DEMO

12:00 – 1:00 p.m.

SEMINAR LUNCHEON

1:00 – 1:15 p.m.

SESSION BREAK

1:15 – 2:45 p.m.

SOCIAL SECURITY AND HEALTH CARE

Presenter: Dennis Gump – Workplace Financial Consultant, Fidelity
Investments

2:45 – 3:00 p.m.

SESSION BREAK

3:00 – 4:15 p.m.

TRANSITIONING TO RETIREMENT FOR CLERGY

Presenter: Rabbi Leora Kaye – Director of Rabbinic Career Services,
CCAR

4:15 – 6:45 p.m.

ONE-ON-ONE APPOINTMENTS

Facilitator: Michael Kimmel – Chief Executive Officer, RPB

Location: Dignity/Endurance

Facilitator: Robert Perry – Director of Participant & Employer Services,
RPB

Location: Discovery Vault

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

Location: Hoyt

8:45 p.m.

INFORMAL NETWORKING

Location: True's Corner (located in the hotel lobby)

DAILY SCHEDULE

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TUESDAY, JUNE 4

8:15 – 9:00 a.m.	DAILY WELCOME AND BREAKFAST BUFFET
9:15 – 10:30 a.m.	WHAT YOU CAN EXPECT FROM RPB WHEN YOU RETIRE <i>Presenter:</i> Robert Perry – Director of Participant and Employer Services, RPB
10:30 – 11:00 a.m.	SESSION BREAK
11:00 a.m. – 12:00 p.m.	PLAN FOR THE 21ST CENTURY RETIREMENT <i>Presenter:</i> Steve Vernon – Founder & President, Rest-of-Life Communications
12:15 – 1:15 p.m.	CLOSING SESSION AND LUNCHEON