

# 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.

### BEYOND DOLLARS: THRIVING IN THE NEW RETIREMENT

(includes 15-minute break)

*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

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

6:30 – 7:00 p.m.

### MA'ARIV SERVICE

*Location:* Hoyt

7:00 – 9:00 p.m.

### DINNER FOR ATTENDEES AND GUESTS

9:00 p.m.

### INFORMAL NETWORKING

# DAILY SCHEDULE

## 2024 Retirement Planning Seminar

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### MONDAY, JUNE 3

8:15 – 9:15 a.m.

#### **DAILY WELCOME**

Breakfast & Market Update with John Merrit – Vice President & Investment Strategist, Fidelity Investments (8:45 a.m. start)

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 and Employer Services, RPB

*Location:* Discovery Vault

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

*Location:* Hoyt

8:45 p.m.

#### **INFORMAL NETWORKING**

## 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**

*Presenter:* 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**

*Presenter:* Steve Vernon – Founder & President, Rest-of-Life  
Communications

12:15 – 1:15 p.m.

**CLOSING SESSION AND LUNCHEON**