

2022 Retirement Planning Seminar

Sunday, November 6 – Tuesday, November 8

Ibis Meeting Room | Hyatt Regency

All sessions will held in the Ibis Meeting Room, unless otherwise noted.

SUNDAY, NOVEMBER 6

12:00 p.m.

REGISTRATION

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

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

6:30 – 7:00 p.m.

MA'ARIV SERVICE

7:00 – 9:00 p.m.

DINNER FOR ATTENDEES AND GUESTS

9:00 p.m.

INFORMAL NETWORKING

DAILY SCHEDULE

2022 Retirement Planning Seminar

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MONDAY, NOVEMBER 7

8:15 – 9:15 a.m.

DAILY WELCOME

- Breakfast & Market Update with Dennis Gump, Workplace Financial Consultant, 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: Helen Dennis – Specialist on Aging, Employment & the New Retirement

Location: Gautier

Facilitator: Michael Kimmel – Chief Executive Officer, RPB

Location: Pearson 2

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

Location: Pearson

8:45 p.m.

INFORMAL NETWORKING

DAILY SCHEDULE

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TUESDAY, NOVEMBER 8

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 (VIA ZOOM)

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

12:15 – 1:15 p.m.

CLOSING SESSION AND LUNCHEON