

Plan For What's Next

Sunday, May 3 – Tuesday, May 5

Embassy Suites Chicago Downtown Magnificent Mile

All sessions will be held in Salon A, B, & C, unless otherwise noted.

SUNDAY, MAY 3

12:45 p.m.

SEMINAR CHECK IN

1:00 – 1:45 p.m.

WELCOME, INTRODUCTIONS, AND SEMINAR OVERVIEW

1:55 – 4:15 p.m.
(includes 15-minute break)

MORE THAN FINANCES — PREPARING FOR LIFE'S NEXT CHAPTER

Presenter: Rabbi Steven E. Kaye, MSW, BCC

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

5:45 – 6:30 p.m.

CONTRACTS FOR NON-CLERGY PARTICIPANTS AND SPOUSES

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

6:45 – 7:15 p.m.

MA'ARIV SERVICE

Location: Mississippi 1 & 2

Leaders: Rabbi Jeffrey Sirkman – Larchmont Temple, Larchmont, NY
Rabbi Kenneth Chasen – Leo Baeck Temple, Los Angeles

7:15 – 9:00 p.m.

DINNER

9:00 p.m.

INFORMAL NETWORKING

Location: 511 Lounge

HEALTHYWEALTH SEMINAR

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MONDAY, MAY 4

8:30 – 8:45 a.m.

DAILY WELCOME

8:45 – 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 LUNCH

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.

EXPLORING IDENTITY, BEST RABBINIC PRACTICES, AND FUTURE GOALS: A SESSION FOR CCAR RABBIS AND THEIR PARTNERS

Presenter: Rabbi Betsy Torop – Director of Rabbinic Education and Support Services, CCAR

4:30 – 7:00 p.m.

ONE-ON-ONE APPOINTMENTS

Facilitator: Michael Kimmel – Chief Executive Officer, RPB

Location: Illinois River

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

Location: Mississippi 1 & 2

7:00 – 8:45 p.m.

DINNER ON YOUR OWN

8:45 p.m.

INFORMAL NETWORKING

Location: 511 Lounge

HEALTHYWEALTH SEMINAR

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TUESDAY, MAY 5

8:30 – 8:45 a.m.

DAILY WELCOME

8:45 – 10:00 a.m.

WHAT YOU CAN EXPECT FROM RPB WHEN YOU RETIRE

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

10:00 – 10:30 a.m.

EXTENDED SESSION BREAK

10:30 – 11:45 a.m.

PUTTING YOUR RETIREMENT PLAN IN ACTION

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

12:00 – 1:00 p.m.

CLOSING LUNCH