

2019 Retirement Planning Seminar

Sunday, May 19 – Tuesday, May 21

JW Marriott | San Francisco, CA

SUNDAY, MAY 19

12:30 p.m.

REGISTRATION

Location: Skyline Foyer

1:20 – 2:20 p.m.

WELCOME, INTRODUCTIONS, AND SEMINAR OVERVIEW

Location: Skyline A

2:30 – 5:30 p.m.

(Break from 4:00 – 4:15 p.m.)

CONCURRENT SESSIONS:

Financial Planning for Retirement (Group 1)

Location: Skyline C

Presenter: Alissa Cheatham – Vanguard Institutional Investor Group

Beyond Dollars: Non-Financial Aspects of Retirement (Group 2)

Location: Skyline B

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

6:30 – 7:00 p.m.

MA'ARIV SERVICE

Location: Skyline A

Leaders: Rabbi Dana Magat – Temple Emanu-El, San Jose, CA
Rabbi Jason Gwasdoff – Temple Israel, Stockton, CA
Lindy Passer – Temple Israel, Stockton, CA

7:00 – 9:00 p.m.

DINNER FOR ATTENDEES AND GUESTS

Location: Skyline A

9:00 p.m.

INFORMAL NETWORKING

Location: Level III Bar (Hotel Lobby)

Host: The RPB team

DAILY SCHEDULE

2019 Retirement Planning Seminar

Sunday, May 19 – Tuesday, May 21

JW Marriott | San Francisco, CA

MONDAY, MAY 20

8:00 a.m.

REGISTRATION

Location: Skyline Foyer

8:15 – 9:00 a.m.

DAILY WELCOME & BREAKFAST BUFFET

Location: Skyline A

9:00 – 12:00 p.m.

(Break from 10:15 – 10:30 a.m.)

CONCURRENT SESSIONS:

Beyond Dollars: Non-Financial Aspects of Retirement (Group 1)

Location: Skyline B

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

Financial Planning for Retirement (Group 2)

Location: Skyline C

Presenter: Alissa Cheatham – Vanguard Institutional Investor Group

12:00 – 12:40 p.m.

SEMINAR LUNCHEON

Location: Skyline A

12:40 – 1:15 p.m.

LUNCHEON PRESENTATION: Plan for the 21st Century Retirement

Location: Skyline A

Presenter: Steve Vernon, F.S.A. – Research Scholar, Stanford Center on Longevity, Financial Security Division

1:30 – 2:30 p.m.

PANEL DISCUSSION: The Realities of Retirement

Location: Skyline A

Panelists: Rabbi Raphael Asher – Rabbi Emeritus, B'nai Tikvah, Walnut Creek, CA

Rabbi Judy Shanks – Rabbi Emeritus, Temple Isaiah, Lafayette, CA

Moderator: Sharon Morton, RJE – Educator Emerita

2:30 – 2:45 p.m.

SESSION BREAK

Location: Skyline Foyer

DAILY SCHEDULE

2019 Retirement Planning Seminar

Sunday, May 19 – Tuesday, May 21

JW Marriott | San Francisco, CA

MONDAY, MAY 20

2:45 – 4:00 p.m.

PRESENTATION: Negotiating Your Retirement Contracts

CCAR Participants and Spouses/Partners

Location: Skyline B

Presenter: Jean-Marc Favreau — Managing Partner, Peer, Gan & Gisler

ARJE, NATA, ECE-RJ, URJ Participants and Spouses/Partners

Location: Skyline C

Presenter: Sharon Morton, RJE — Educator Emerita
Alyce Gunn — Chief Financial Officer, RPB

4:00 – 6:30 p.m.

ONE-ON-ONE APPOINTMENTS

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

Location: Skyline B

Facilitator: Alyce Gunn — Chief Financial Officer, RPB

Location: Skyline C

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

Location: Skyline A

6:30 p.m.

DINNER ON YOUR OWN

8:00 p.m.

INFORMAL NETWORKING

Location: Level III Bar (Hotel Lobby)

Host: The RPB Team

DAILY SCHEDULE

2019 Retirement Planning Seminar

Sunday, May 19 – Tuesday, May 21

JW Marriott | San Francisco, CA

TUESDAY, MAY 21

8:00 a.m.

REGISTRATION

Location: Skyline Foyer

8:15 – 9:00 a.m.

DAILY WELCOME AND BREAKFAST BUFFET

Location: Skyline A

9:15 – 10:15 a.m.

PRESENTATION: What you can expect from RPB when you retire

Location: Skyline A

Presenters: Robert Perry — Director of Participant and Employer Services, RPB

Alyce Gunn — Chief Financial Officer, RPB

10:15 – 10:45 a.m.

SESSION BREAK

Location: Skyline Foyer

10:45 a.m. – 12:15 p.m.

INTRODUCTION TO SOCIAL SECURITY BENEFITS AND MEDICARE

Location: Skyline A

Presenter: Shelton Fong – Public Affairs, Social Security Administration

12:30 – 1:30 p.m.

CLOSING SESSION AND LUNCHEON

Location: Skyline A