

2018 RPB Retirement Planning Seminar

Sunday, April 22 - Tuesday, April 24, 2018

Chicago, Illinois

Preliminary Program

SUNDAY, APRIL 22

- 12:30 p.m. Registration
- 1:20 – 2:20 p.m. Welcome, Introductions, and Seminar Overview
- 2:30 – 5:30 p.m.
(Break from 4:00 – 4:15 p.m.) CONCURRENT SESSIONS:
- Financial Planning For Retirement **Group 1**
Presenter: Andrew Price – Vanguard Institutional Investor Group
 - Beyond Dollars: Non-Financial Aspects of Retirement **Group 2**
Presenter: Helen Dennis – Specialist on Aging, Employment and the New Retirement
- 6:30 – 7:00 p.m. **MA'ARIV SERVICE**
Clergy: Rabbi Stacy Offner – Temple Beth Tikvah, Madison, CT
- 7:00 – 9:00 p.m. Dinner for Attendees and Guests
- 9:00 p.m. Informal Networking
With Michael Kimmel and **RPB's** team

MONDAY, APRIL 23

- 8:00 a.m. Registration
- 8:15 – 9:00 a.m. Daily Welcome and Breakfast Buffet
- 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**
Presenter: Helen Dennis – Specialist on Aging, Employment & the New Retirement
 - Financial Planning for Retirement **Group 2**
Presenter: Andrew Price – Vanguard Institutional Investor Group
- 12:00 – 12:45 p.m. Seminar Luncheon
- 12:45 – 1:05 p.m. PRESENTATION: Luncheon Speaker
Presenter: To Be Announced
- 1:15 – 2:30 p.m. PANEL DISCUSSION: The Realities of Retirement
Panelists: To be Announced

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- 2:30 – 2:45 p.m. Session Break
- 2:45 – 4:00 p.m. PRESENTATION: Negotiating Your Retirement Contracts
- CCAR Participants with Spouses/Partners
Presenter: Michael Gan, Esq. – Managing Partner, Peer, Gan & Gisler
 - ARJE, NATA, ECE-RJ, URJ Participants with Spouses/Partners
Presenters: Michael Kimmel – Executive Director, RPB
Sharon Morton, RJE – Retired Educator
- 4:00 – 6:30 p.m. ONE-ON-ONE APPOINTMENTS WITH RPB STAFF AND HELEN DENNIS*
- Facilitators:
Michael Kimmel – Executive Director, RPB
Robert Perry – Director of Participant and Employer Services, RPB
Helen Dennis – Specialist in Aging, Employment & the New Retirement
- *Sign up for appointments when registration for the conference opens*
- 6:30 p.m. Dinner On Your Own
- 8:00 p.m. Informal Networking
With Michael Kimmel and RPB's team

TUESDAY, APRIL 24

- 8:00 a.m. Registration
- 8:15 – 9:00 a.m. Daily Welcome and Breakfast Buffet
- 9:15 – 10:15 a.m. PRESENTATION: What You Can Expect From RPB When You Retire
Presenters: Michael Kimmel – Executive Director, RPB
Robert Perry – Director of Participant and Employer Services, RPB
- 10:15 – 10:45 a.m. Session Break
- 10:45 AM – 12:15 p.m. PRESENTATION: Introduction to Social Security Benefits And Medicare
Presenter: Public Affairs Specialist, Social Security Administration
- 12:30 – 1:30 p.m. Closing Session and Luncheon