

2021 Retirement Planning Seminar

Sunday, October 24 – Tuesday, October 26

SUNDAY, OCTOBER 24

2:00 p.m.

WELCOME

2:20 – 4:05 p.m.
(includes 15-minute break)

FINANCIAL ASPECTS OF RETIREMENT

Presenter: Bill Kalwas, Virtual Education Consultant – Fidelity Investments

4:15 – 4:45 p.m.

BREAKOUT GROUPS

- Based on years until retirement

4:45 – 5:00 p.m.

DAILY WRAP FOR ALL ATTENDEES

DAILY SCHEDULE

2021 Retirement Planning Seminar

Sunday, October 24 – Tuesday, October 26

MONDAY, OCTOBER 25

11:00 – 11:15 a.m.

MORNING WELCOME

11:15 a.m. – 1:00 p.m.
(includes 15-minute break)

BEYOND DOLLARS: THRIVING IN THE NEW RETIREMENT

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

1:00 – 1:45 p.m.

BREAK

1:45 – 2:20 p.m.

CONVERSATION CAFÉ

- RPB Open Q&A
- Fidelity NetBenefits Demo and Q&A with Sean Carson – Retirement Specialist, Fidelity Investments

2:20 – 3:30 p.m.

CONCURRENT SESSIONS:

Negotiating Your Retirement Contract for Clergy

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

Transitioning to Retirement for Educators, Executive Directors, and Others

Presenter: Sharon Morton – Retired Educator, RJE

3:30 – 3:45 p.m.

DAILY WRAP FOR ALL ATTENDEES

3:45 – 4:45 p.m.

TRANSITIONING TO RETIREMENT FOR CLERGY

Presenter: Rabbi Donald B. Rossoff, D.D., R.J.E.

DAILY SCHEDULE

2021 Retirement Planning Seminar

Sunday, October 24 – Tuesday, October 26

TUESDAY, OCTOBER 26

10:30 a.m.

MORNING SERVICE

Leaders: Rabbi Renni S. Altman, Rabbi – Vassar Temple,
Poughkeepsie, NY

Rabbi Michael Torop, Rabbi Emeritus – Temple Beth-El,
St. Petersburg, FL

11:00 a.m. – 1:00 p.m.
(includes 15-minute break)

SOCIAL SECURITY AND HEALTHCARE

Presenter: Bill Kalwas, Virtual Education Consultant – Fidelity
Investments

1:00 – 1:45 p.m.

BREAK

1:45 – 2:45 p.m.

PLAN FOR THE 21ST CENTURY RETIREMENT

Presenter: Steve Vernon – Founder & President, Rest-of-Life
Communications & Research Scholar – Stanford Center on
Longevity

3:00 – 4:15 p.m.

WORKING WITH RPB IN RETIREMENT

Presenter: Robert Perry – RPB

4:15 – 4:30 p.m.

CLOSING REMARKS