



In collaboration with



Inaugural Retiree Roundtable

Bear Mountain Inn

April 19, 2023

AGENDA

Session	Time (Eastern)	Topic
Arrivals and Breakfast	9:00 to 9:30 (30 min)	
Opening	9:30 to 9:40 (10 min)	Welcome <ul style="list-style-type: none">• Speaker: <u>Eddie Stone</u>, Retirees for Justice
Keynote Address	9:40 to 10:40 (60 min)	Home Equity in Retirement—The Missing Puzzle Piece? <ul style="list-style-type: none">• Speaker: <u>Harlan Accola</u> (National Reverse Mortgage Director, Movement Mortgage) (Platinum Sponsor)
Roundtable 1	10:40 to 11:40 (60 min)	Pension De-risking: Legislative and Policy Issues <ul style="list-style-type: none">• Moderator: <u>Eddie Stone</u>, Retirees for Justice• Panelist 1: <u>Steve Pilger</u>, Ash Brokerage• Panelist 2: <u>Marty Leary</u>, Unite Here!• Panelist 3: <u>Karen Friedman</u>, Pension Rights Center

Break	11:40 to 11:50 (10 mins)	
Roundtable 2	11:50 to 12:35 (45 min)	<p><i>Lifetime Planning for Retirees and their Families – Life Insurance, Health Insurance, Long Term Care and other Sleep-Saving Solutions</i></p> <ul style="list-style-type: none"> • Moderator: <u>Don Trudeau</u>, Benistar Administrative Services, Inc. (<i>Gold Sponsor</i>) • Panelist 1: <u>Michael Roberts</u>, CPT Wealth Strategies • Panelist 2: <u>David Dorfman</u>, Esq. • Panelist 3: <u>Lori Epstein</u> Esq., Lori Epstein Consulting Group. • Panelist 4: <u>Eric St. Peirre</u>, Humana Inc, Group Medicare Segment.
Lunch	12:35 to 1:35 (60 min)	<p><i>LUNCH and Annual General Meeting of the Association of BellTel Retirees</i></p>
Roundtable 3	1:35 to 2:20 (45 min)	<p><i>Spin-offs, The Texas Two-Step, and Consequences for Retirees – What Looms Ahead?</i></p> <ul style="list-style-type: none"> • Moderator: <u>Eddie Stone</u>, Executive Director, Retirees for Justice • Panelist 1: <u>John Phelps</u>, President, GE Retiree Benefit Solutions • Panelist 2: <u>Pamela Harrison</u>, Board member, Association of Belltel Retirees • Panelist 3: <u>Carol Knotts</u>, Board member, Association of DuPont Retirees
Break	2:20 to 2:30 (10 min)	
Roundtable 4	2:30 to 3:15 (45 min)	<p><i>When Occupational Safety and Health Fears Prey on Retirees</i></p> <ul style="list-style-type: none"> • Moderator: <u>Thomas Butler</u>, Butler Associates PR • Panelist 1: <u>Tommy Steed</u>, Chairman, Association of Belltel Retirees • Panelist 2: <u>Carol Knotts</u>, Board member, Association of DuPont Retirees • Panelist 3: <u>John Phelps</u>, President, GE Retiree Benefit Solutions
Closing	3:15 to 3:30 (15 min)	<p><i>Thank You</i></p> <ul style="list-style-type: none"> • Speaker: <u>Eddie Stone</u>, Retirees for Justice