



A PEAK AT THE AGENDA for the Retiree Roundtable 2023

Dear Lisa,

We know you've been dying to see the agenda for our big Retiree Roundtable coming up on April 19th

So here it is (click on the image to enlarge it on your screen).

Session	Time	Topic
Arrivals and Breakfast	9:00 to 9:30 (30 min)	
Opening	9:30 to 9:40 (10 min)	<p>Welcome</p> <ul style="list-style-type: none"> Speaker: Eddie Stone, Retirees for Justice
Keynote Address	9:40 to 10:40 (60 min)	<p>Home Equity in Retirement—The Missing Puzzle Piece?</p> <ul style="list-style-type: none"> Speaker: Hafar Asada (movement.com) (Platinum Sponsor)
Roundtable 1	10:40 to 11:40 (60 min)	<p>Pension De-risking: Legislative and Policy Issues</p> <ul style="list-style-type: none"> Moderator: Eddie Stone, Retirees for Justice Panelist 1: Steve Flegg, Ash Brokerage Panelist 2: Steve Leary, United Here! Panelist 3: Lynn Erickson, Pension Rights Center
Break	11:40 to 11:50 (10 min)	

Roundtable 2	11:50 to 12:35 (45 min)	<p>Lifetime Planning for Retirees and their Families – Life Insurance, Health Insurance, Long Term Care and other Sleep-Saving Solutions</p> <ul style="list-style-type: none"> Moderator: Don Trudgian, Retiree Administrative Services, Inc. (Gold Sponsor) Panelist 1: Michael Roberts, CFP Wealth Strategies Panelist 2: David Dorfman, FRS Panelist 3: Lynn Erickson, FRS, Long Equities Consulting Group Panelist 4: Erik St. Pierre, Humana Inc, Group Medicare Segment.
Lunch	12:35 to 1:35 (60 min)	
Roundtable 3	1:35 to 2:20 (45 min)	<p>Spin-offs, The Texas Two-Step, and Consequences for Retirees – What Looms Ahead?</p> <ul style="list-style-type: none"> Moderator: Eddie Stone, Retirees for Justice Panelist 1: John Phillips, Chairman, GE Retiree Benefit Solutions Panelist 2: Doretha Harrison, Board member, Association of Belthel Retirees Panelist 3: Carol Knotts, Board member, Association of DuPont Retirees
Break	2:20 to 2:30 (10 min)	
Roundtable 4	2:30 to 3:15 (45 min)	<p>When Occupational Safety and Health Fears Prey on Retirees</p> <ul style="list-style-type: none"> Moderator: Thomas Butler Panelist 1: Tommy Stead, Chairman, Association of Belthel Retirees Panelist 2: Carol Knotts, Board member, Association of DuPont Retirees Panelist 3: John Phillips, Chairman, GE Retiree Benefit Solutions Panelist 4: Pending
Closing	3:15 to 3:30 (15 min)	<p>Thank You</p> <ul style="list-style-type: none"> Speaker: Eddie Stone, Retirees for Justice

It's not too late to RSVP now! All current and future retirees are welcome.

WHERE: Bear Mountain Inn, Tomkins Cove, NY or online via Zoom

WHEN: April 19, 2023, 9AM to 3:30 PM

RSVP by clicking HERE:

<https://forms.gle/31ueHFBPMLM2VhZf8>

Best,

Eddie Stone



Edward Stone

Executive Director, Retirees for Justice

Retirees For Justice

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[Click here to visit our website.](#)



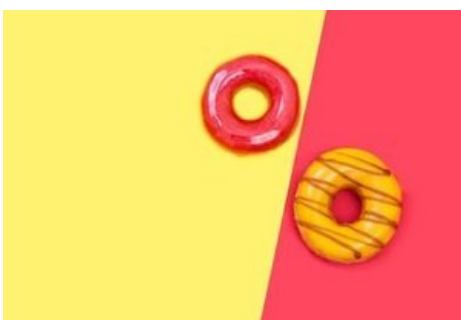
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