



## ZOOM LINK for the Retiree Roundtable 2023

Dear Lisa,

Retiree Roundtable 2023 is getting closer! We know you're looking forward to it as much as we are.

A few reminders for you!

- You have **one day left** to take advantage of the **Special Rates at Bear Mountain Inn**. Rooms at Bear Mountain Inn, April 18th or 19th: **\$195 per night**. Stone Cottage rooms (a few steps from roundtable venue), April 18th: **\$135 per night. Only available if you book before April 15th**. After that, regular pricing will apply. Call Bear Mountain to book TODAY at (855) 548-1184.
- **To all those joining us in person:** We are hosting **drinks** (including soft drinks) **on the deck** outside the Roundtable venue from 4PM on April 19th. We hope you will plan to stay to unwind with a drink and a chat after the event. Come and take in some gorgeous views as the afternoon winds down.
- **To all those joining us remotely:** The **Zoom invitation** is pasted below.
- Finally, if you scroll all the way to the end, you'll find an updated version of the **agenda**. Remember to click on the images to enlarge them on your screen.

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*Retirees for Justice is inviting you to a scheduled Zoom meeting.*

*Topic: Retiree Roundtable 2023 - Presented by Retirees for Justice*

*Time: Apr 19, 2023 09:30 AM Eastern Time (US and Canada)*

*Join Zoom Meeting*  
<https://zoom.us/j/94163702475?pwd=QUZOUi9Nb1hsTHo0OUUvbkNqeFZtZz09>


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Find your local number:  
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RETIREES  
FOR  
JUSTICE

In collaboration with



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)	<b>Welcome</b> <ul style="list-style-type: none"> <li>• Speaker: <b>Eddie Stone</b>, Retirees for Justice</li> </ul>
Keynote Address	9:40 to 10:40 (60 min)	<b>Home Equity in Retirement—The Missing Puzzle Piece?</b> <ul style="list-style-type: none"> <li>• Speaker: <b>Harlan Acosta</b> (movement.com) (Platinum Sponsor)</li> </ul>
Roundtable 1	10:40 to 11:40 (60 min)	<b>Pension De-risking: Legislative and Policy Issues</b> <ul style="list-style-type: none"> <li>• Moderator: <b>Eddie Stone</b>, Retirees for Justice</li> <li>• Panelist 1: <b>Steve Pilger</b>, Ash Brokerage</li> <li>• Panelist 2: <b>Barry Lerner</b>, Unile-Hershey</li> <li>• Panelist 3: <b>Karen Friedman</b>, Pension Rights Center</li> </ul>
Break	11:40 to 11:50 (10 mins)	

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

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**

[info@retireesforjustice.org](mailto:info@retireesforjustice.org)

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



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