

RETIREMEET²⁰²⁴

BELLEVUE, WA

FEBRUARY 24

Agenda – Saturday February 24

8:00 AM – 8:15 AM

Welcome

Tom Cock & Don McDonald from Talking Real Money

8:15 AM – 8:45 AM

Investing for Retirement

Don McDonald, Co-Host, Talking Real Money

8:45 AM – 9:15 AM

Creating Lifelong Income

Tom Cock, Co-Host, Talking Real Money

9:15 AM – 9:45 AM

The Plan

Jason Gentile, Partner & Senior Financial Advisor, Apella

9:45 AM – 10:15 AM

Getting Medicare Right

Kevin Peterson, American Senior Resources

10:15 AM – 10:30 AM

Break

10:30 AM – 11:00 AM

Where Will You Live

Tina Hall

11:00 AM – 11:30 AM

Protecting Yourself

Herb Weisbaum, Consumerman

11:30 AM – 12:00 PM

How Much is Enough

Paul Merriman, Merriman Education Foundation

12:00 PM – 12:45 PM

Lunch, Q&A

Tom Cock & Paul Merriman

12:45 PM – 1:15 PM

Your Estate

Beth McDaniel

1:15 PM – 2:00 PM

Investing for the Future

Weston Wellington, Dimensional Funds

2:00 PM – 2:30 PM

What's Next - It's Up to You!

Rebecca Crichton

2:30 PM – 3:00 PM

Q&A

Tom Cock & Don McDonald from Talking Real Money

3:00 PM

Wrap-Up