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** • Speaker: Eddie Stone, Retirees for Justice
Keynote Address	9:40 to 10:40 (60 min)	**Home Equity in Retirement—The Missing Puzzle Piece?** • Speaker: Harlan Accola (movement.com) (*Platinum Sponsor*)
Roundtable 1	10:40 to 11:40 (60 min)	**Pension De-risking: Legislative and Policy Issues** • Moderator: Eddie Stone, Retirees for Justice • Panelist 1: Steve Pilger, Ash Brokerage • Panelist 2: Marty Leary, Unite Here! • Panelist 3: Karen Friedman, Pension Rights Center
Break	11:40 to 11:50 (10 mins)	

Roundtable 2	11:50 to 12:35 (45 min)	***Lifetime Planning for Retirees and their Families – Life Insurance, Health Insurance, Long Term Care and other Sleep-Saving Solutions*** • Moderator: Don Trudeau, Benistar Administrative Services, Inc. *(Gold Sponsor)* • Panelist 1: Michael Roberts, CPT Wealth Strategies • Panelist 2: David Dorfman, Esq. • Panelist 3: Lori Epstein Esq., Lori Epstein Consulting Group. • Panelist 4: Eric St. Peirre, Humana Inc, Group Medicare Segment.
Lunch	12:35 to 1:35 (60 min)	***LUNCH*** ***and*** ***Annual Member Meeting of the Association of BellTel Retirees***
Roundtable 3	1:35 to 2:20 (45 min)	***Spin-offs, The Texas Two-Step, and Consequences for Retirees – What Looms Ahead?*** • Moderator: Eddie Stone, Retirees for Justice • Panelist 1: John Phelps, Chairman, GE Retiree Benefit Solutions • Panelist 2: Pamela Harrison, Board member, Association of Belltel 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)	***When Occupational Safety and Health Fears Prey on Retirees*** • Moderator: Thomas Butler, Butler Associates PR • Panelist 1: Tommy Steed, Chairman, Association of Belltel Retirees • Panelist 2: Carol Knotts, Board member, Association of DuPont Retirees • Panelist 3: John Phelps, Chairman, GE Retiree Benefit Solutions • Panelist 4: Pending
Closing	3:15 to 3:30 (15 min)	***Thank You*** • Speaker: Eddie Stone, Retirees for Justice