

RETIREMENT PLANNING PROGRAM AGENDA
(For Those Very Near Retirement)
PROGRAM LOCATION
EMPLOYER SPONSOR

DAY ONE - MONTH, DATE, YEAR

8:30 - 8:40 **Welcome**
Name, Training Coordinator

8:40 - 10:30 **Financial Planning**
Name of Speaker

10:30 - 10:45 **Break**

10:45 - 12:00 Social Security Benefits
Name of Speaker from Social Security Administration

12:00 - 1:00 Lunch

1:00 - 3:00 Legal Issues & Estate Planning
Name of Speaker (s)

Day Two - Month, Date, Year

8:00 - 8:05 Welcome Back/Introduction

8:05 - 9:05 Health Facts for Maturing Adults
Name of Speaker

9:05 - 9:50 Employee Benefits - Medicare
Name of Speaker

9:50 - 10:00 Break

10:00 - 12:00 Employee Benefits - Employer's Retirement System
Name of Speaker