

FINANCIAL SEMINARS- THE FUNDAMENTALS OF FINANCIAL WELL-BEING
A series offered by Maria Popa, MBA and Financial Advisor.

April 22, 2018

Planning for retirement/ Sources of retirement income (1 hr)

- * Envision your retirement
- * Build your retirement strategy
- * Sources of retirement income
- * Building your nest egg
- * Retirement risks to consider

Sources of retirement income

- * 401Ks
 - * IRAs (Traditional and Roth)
 - * Social security
 - * Annuities
 - * Other sources of income
- * Everybody should participate regardless the age

April 29,2018

Building your retirement income now strategy/ Building your retirement income later strategy (1 hr)

- * Longevity
 - * Inflation
 - * Healthcare costs
 - * Housing
 - * Market
 - * Excessive withdrawals
- * Everybody should participate regardless the age

May 20, 2018

The social side of retirement (45 min)/ Social Security Retirement Benefits and Your Future

- * History, background, and a few fun facts
- * The future of social security
- * Your social security retirement benefits
- * Making a decision that's right for you

May 27, 2018

Long Term Care Insurance Seminar (45 min)

- a. What is the LTC insurance
 1. How Long Term Care is defined
 2. When and where LTC insurance can be used
 3. The benefits of LTC insurance