The Pacific Northwest Chapter of the International Society of Certified Employee Benefit Specialists

ISCEBS

WEBINAR PROGRAM

Retirement Readiness
Using 2020 Vision in Planning for Retirement

Wednesday, January 8, 2020 | 11:30 – 1:00 Pacific

Via Webinar - No Cost

Register Online

Retirement Readiness is on the minds of many. No matter a person's age, retirement planning is imperative regardless of preparing to leave the workforce in the next 5, 10, 20, 30 or 40 years. This understandably is an important topic for employers and their employees as well. This course is designed to provide a roadmap of the different avenues available to individuals, both through their employer and directly, to prepare for retirement.

Our speaker will discuss:

- How one saves for retirement amidst life's other priorities
- A variety of employer retirement plans and savings options outside of employer-sponsored retirement plans or if no employer plan is available, i.e., state savings plans, IRAs, etc.
- Types of investments and rule of thumb for allocations based on timeframe for retirement
- If an HSA-qualified medical plan is available as a healthcare option, the advantages of contributing to the Health Savings Account with an eye toward retirement savings

Top Take Aways

- Developing a budget and personal planning
- Savings vehicles and investments options available
- Planning for expenses in retirement

Speaker: Cynthia Boman Thompson, MS, CFP
President, Financial Planning Association of Oregon and SW Washington

Cyndi is a licensed Certified Financial Planner™ and President for the Financial Planning Association of Oregon and SW Washington for 2020. She holds a MS degree in Financial Planning from the College of Financial Planning as well as a BS in Business Administration from the Leeds School of Business at the University of Colorado. Cyndi's financial planning advice has been quoted in *Forbes, USA Today, TheStreet* and *CNBC* among other publications. She has had dozens of financial planning articles published in the last 20 years on a variety of topics and has been a seminar presenter at local, national and international conferences.

Sponsored By:

Quantum HEALTH

Professional Development Credits available by attending this session:

Qualifies for 1 CEBS continuing professional education (CPE) credit

Requested 1 HR (General) credit towards aPHR™, aPHRi™, PHR®, PHRca®, SPHR®, GPHR®, PHRi™ and SPHRi™ recertification

This program is valid for 1 PDC toward SHRM-CP and SHRM-SCP recertification

Qualifies for 1 ASPPA continuing education (CE) credit

Event Contact: Mary Fleming | maryflemingphr@yahoo.com | 914-584-3588