UDBELL
Federal Credit Union

Retirement Planning Webinar Series

Please join our Financial Advisor, Bob Protesto CFP®, for our 4-part webinar series. We will be exploring the many facets of retirement and estate planning. You can choose to attend any or all of the following webinars. Registration is limited.

Retire on Purpose

★ ***with Dan Starishevsky, VP, National Speaker at Jackson National***

Wednesday, October 20th at 6pm

Retirees often experience the retirement "sugar rush". The thrill that comes just after saying goodbye to the 9 to 5. It's often followed by a crash when they suddenly realize they have to fill 30 years with…"something".

Join us for this Webinar to learn:

-How to pursue your purpose after retirement.
-A deeper approach to retirement planning.

Social Security: 7 Keys to Enhancing Benefits

★ ***with Beau Barrabee CRPC, Regional VP at Allianz Life***

Wednesday, October 27th at 6pm

Social Security continues to play a critical role in a successful retirement strategy. Is your plan taking full advantage of what Social Security offers? Together, let's rethink your retirement income strategy. **Join us for this Webinar to learn:**

-Keys to help you understand the basics of S.S.
-When to start taking S.S. benefits.
-Keys that take a deeper dive into S.S., such as working in retirement.

Planning for Healthcare Costs in Retirement

★ ***with Ed Malloy at Malloy Medicare Advisors & Chad Eyrich at Ash Brokerage***

Wednesday, November 3rd at 6pm

Rising healthcare costs are amoung the top 3 concerns for retirees.

Join us for this Webinar to learn:

-What you need to know about Medicare. How & when you should enroll.
-What it costs and what it covers.
-What you need to know about Long-term Care and why it's important.

Get Your Financial House in Order

★ ***with Mark Zinder at Mark Zinder & Associates***

Wednesday, November 10th at 6pm

Having a financial plan for retirement is a good start, however there is more work to be done! Preparing and organizing your legal documents is an important step to protect your family in case of an emergency. **Join us for this Webinar to learn:**

-What is a Health Directive and why do I need one?
-How and when to create a Trust?
-How to get your documents in order.

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