UDBELL
Federal Credit Union

Retirement Planning
2022 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 planning. You can choose to attend any or all of the following webinars. Registration is limited.

Investing for Retirement: Market Update, Where Are We & What's Next?

★ *with Marc Kirby, VP at JPMorgan Asset Management*

Wednesday, October 19th at 5:30pm

Markets have been under pressure this year as elevated inflation, a more hawkish Federal Reserve, slower growth, and geopolitical tensions have all weighed on both valuations and investor sentiment. What does this mean for investors as they save for retirement, and especially as they turn their nest egg into a consistent income stream in retirement?

Are You Sure Your Retirement Strategy Fits?

★ *with Alex Murguia Ph.D., CEO & Co-Founder of RISA LLC*

Wednesday, October 26th at 5:30pm

If you've ever wondered: How do I transition into retirement? Where do I start? How do I put a plan together? ...Then you do not want to miss this webinar. We will review the steps you need to:

- Ensure that your retirement plan is aligned with your personal style
- Implement your plan
- Avoid potential headwinds while focusing on your strengths

We will have a very special offer for you at the end of this webinar, so be sure to attend live.

Social Security: 7 Keys to Enhancing Benefits

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

Wednesday, November 2rd at 5:30pm

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 of Malloy Medicare Advisors*

Wednesday, November 9th at 5:30pm

Rising healthcare costs is consistently among 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.
- Changes in 2023 & beyond due to recent legislation.

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