



Agenda – September 21-22, 2026 – First UMC, Lakeland
72 Lake Morton Drive, Lakeland, FL 33801

DAY 1

10:00–10:15	Arrival, Greeting, Introductions, and Devotion	Rev. Ed New
10:15–10:45	Understanding the Retirement Landscape	Cindy Burmann/Elena Nicholas Jeanine Henry
10:45–11:45	Social Security	Eric J. Jackson, RSSA®
11:45–12:30	Lunch	
12:30–1:30	Estate Planning	John Lancaster
1:30–2:15	Staying Healthy in Retirement	Adam Hamid
2:15–2:30	Break	
2:30–4:00	Medicare	Gerald Buzbee
4:00–4:15	Break	
4:15–5:00	Housing Options in Retirement	Scott Bowne
5:00–5:30	Retiree Health Benefits	Diana Welsh
5:30–6:15	Dinner	First UMC, Lakeland





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DAY 2

8:00–9:00	Breakfast	
9:00–10:00	Wespath-The Retirement Process Part I	Bob Christophel & Frank O’Brien
10–10:15	Break	
10:15–11:15	Wespath-The Retirement Process Part II	Bob Christophel & Frank O’Brien
11:15 – 11:30	Break	
11:30–12:00	Wespath-The Retirement Process Part III	Bob Christophel & Frank O’Brien
12:00–12:45	Lunch	First UMC, Lakeland
12:45–1:45	Planning for Taxes and Retirement	Brent Parrish and Hannah Parana
1:45–2:45	Extended Care Planning: How To Protect Yourself And Those You Love When Your Health Changes	Margie Barrie
2:45–3:00	Break	
3:00– 4:00	Making Your Money Last Questions	Eric J. Jackson, RSSA®
4:00	Comments, Adjourn	

