LOVE YOUR FUTURE

Retiremeet returns to Bellevue on February 16, 2019.

Retiremeet 2019 is officially **SOLD OUT!** We have started a waiting list for anyone who would still like to attend but has not yet purchased tickets. If we have cancelations, we will invite those from the waiting list. To be added to the list, please call us at 800-386-3004. Thank you for your overwhelming support, we can't wait to see you all on February 16th!

MEET THE FUTURE OF YOUR DREAMS

Learn how to protect and pass along your assets. See the latest trends in retirement living. Hear about living longer while staying healthier. Explore exciting new things to do after you stop spending most of your time working.

Fall in love with your future! This full day of classes, lectures, and experiences could be the first step toward the retirement of your dreams.

THE MONEY

To retire well you need money. Do you know how much? We'll help you figure that out. With pensions going away, how will you save enough and how should it be invested. Learn the

THE COMFORT

You will probably live longer than previous generations. How will you stay healthy and fit in those extra years? At some point, we will all face aging and health challenges. Where will you find

THE JOY

You deserve to enjoy your retirement! Once you stop working, what will you do? Take up a new hobby? Find ways to help others? Explore places you have only imagined? At

truth about most "investments" and discover the simple science of building wealth.

and afford the best care, when you need it? Find comfort at Retiremeet.

Retiremeet, you will hear new ideas and find unexpected paths to a joyful future.

THE EVENT

Saturday, February 16, 2019

A day of future exploration, education, and discovery

A DAY TO MEET YOUR IDEAL FUTURE

Retiremeet is for everyone who wants to enjoy an incredible retirement. It is not just for retirees or those approaching retirement age. We will be presenting a huge variety of classes and sessions on everything from how to start investing for retirement, to health care, asset protection, lifestyles, and much more. There has never been a future planning event like Retiremeet.

AN OPPORTUNITY TO LEARN

Throughout the day we'll present a variety of classes and lectures on critical retirement planning issues. We will have classes on real retirement investing, creating the income you will need in retirement, the critical estate and elder-law issues that you must know, social security planning, consumer protection, and MUCH more.

A MAKEOVER TO SAVE YOUR FUTURE

Take advantage of FREE 401k "makeovers" throughout the day. Just bring your latest statement and an investment adviser will help you create the best possible portfolio in a private, confidential meeting.

FREE STUFF TO GO

As we conclude, you'll have a chance to talk with our experts and receive a variety of free books and other gifts.

SOMETHING FOR EVERYONE

Retiremeet will have something for everyone, because retirement is something everyone should be thinking about. We will have information for retirees, pre-retirees, and those just getting started on their future journey.

	Main Room	Breakout 1	Breakout 2
7:45	**BREAKFAST SERVICE** Doors open at 7:30		
8:00	*Welcome to Retiremeet V* **Tom Cock & Don McDonald** Talking Real Money		
8:15	*The Science of Retirement Investing* **Don McDonald** Vestory		
9:00	*Retirement Planning: What We Do Know* **Tom Cock** Vestory		
10:00	*Avoiding Scams and Identity Theft* **Herb Weisbaum** KOMO & consumerman.com	*Your Future Housing and Care Options* **Tina Hall** ERA LIving	*Female Financial Fundamentals* **Barbara Devereaux** Vestory
10:50	*Understanding Social Security* **Dr. Laurel Beedon** WISER	*Retirement is an Adventure* **Ed Perkins** Smarter Travel	*Retirement and Planning First Steps* **Rick Gregorek** Gregorek and Associates

11:30	***Lunch Service*** Meet the Speakers		
11:45	*Redefining Investment Advice* **Weston Wellington** Dimensional Funds		
12:40	*Keys to a Better Retirement* **Dan Solin** interviewed by Don McDonald	*Charitable Giving Trends & Strategies* **Julia Reed** Schwab Charitable	*Long-Term Care Options* **Barbara Devereaux** Vestory
1:30	*Wills, Trusts, and Common Mistakes* **Rick Gregorek** Gregorek and Associates	*Ultimate Q&A* **Dan Solin and Bill Higgins**	*Retirement Transitions* **Pete Finlon** Certified Retirement Coach
2:20	*The Path to a Brighter Future* **All of our guests** Panel Discussion		
3:00	**EVENT CONCLUSION** Meet the Speakers		

SPECIAL GUESTS

Our special guests include KOMO's Herb Weisbaum, also known as The ConsumerMan, Wes Wellington with Dimensional Fund Advisors, New York Times bestselling author Dan Solin, and many more.

EXPERTS

A variety of retirement experts will be on hand to inform and enlighten you about the most important issues you might face in retirement. We'll discuss everything from financial planning and legal considerations, to travel and lifestyle.

THE EXPERTS TEACHING AT BELLEVUE RETIREMEET

DON MCDONALD **TOM COCK** **DAN SOLIN**

Don has been an educator and advocate for individual investors since 1988. He hosted a popular national radio show on Business Radio Network for over 20 years and published the *Don McDonald Moneyletter*. He and his friend and partner, Tom Cock, founded the fee-only investment advisory firm, Vestory in 2009. Don also co-hosts Talking Real Money on KOMO Newsradio and publishes *real investing journal,* the only magazine in the country devoted to nothing but real investing.

WESTON WELLINGTON

Weston Wellington, a Vice President with Dimensional, is one of the firm's market research experts. He works closely with financial advisors in the US, Canada, Europe, and Australia, showing them how a research-based "equilibrium" strategy may be a good way to pursue investment success and why their clients are unlikely to hear about this approach from the usual sources of financial advice. One of the firm's most engaging speakers, Weston also is an accomplished writer whose column, *Down to the Wire*, appears regularly on Dimensional's client website. Prior to joining Dimensional in 1995, Weston was director of research at LPL Financial Services, Inc. in Boston, and he has accumulated over 40 years of experience in the investment industry. He holds a BA in history from Yale University.

Tom has been in financial media for 30 years. For several years he was the host of the popular PBS television program, Serious Money. Tom helped build Merriman Capital into one of the premier fee-only invesment advisors in the country. In 2009, he founded the education-focused fee-only investment advisory, Vestory along with his long-time friend and associate, Don McDonald. In addition to his role of CEO at Vestory, Tom teaches numerous investing and retirement classes and co-hosts Talking Real Money every Saturday at noon on KOMO Newsradio.

HERB WEISBAUM

Herb Weisbaum, "The ConsumerMan", is one of America's top consumer experts, helping people save money and avoid scams for more than 35 years. His Emmy award-winning reports have exposed everything from bogus investments to identity theft. Herb is a regular contributor to NBCNews.com. He also anchors the Midday News from 1-3pm on KOMO radio.

BARBARA DEVEREAUX

Barbara joined Vestory in January 2018 with a focus on Adviser Services and client relations. Barbara has over thirty years of management experience, with eighteen years concentrated in insurance and investments. During her career, Barbara has focused on womens

Dan is the New York Times bestselling author of the Smartest series of books which include: The Smartest Investment Book You'll Ever Read, The Smartest 401(k) Book You'll Ever Read, The Smartest Retirement Book You'll Ever Read, and The Smartest Portfolio You'll Ever Own. He is also the author of Does Your Broker Owe You Money? and has testified before congressional subcommittees during investigations of the mandatory arbitration system. He blogs for The Huffington Post and AdvisorPerspectives.com and is a graduate of Johns Hopkins University and the University of Pennsylvania Law School.

RICK GREGOREK

Through his firm, GREGOREK and ASSOCIATES, PLLC, Rick offers a full line of legal service to individuals, families, and closely held businesses. Rick is licensed to practice law in Washington and Oregon. He is a member of the American, Washington and Oregon Bar Associations and belongs to the Sections on Real Property, Probate & Trusts, Business Law, Guardianship and Elder Law. He earned his JD from Seattle University. He currently co-hosts Your Partner In Law on Seattle's KIRO 97.3 FM and KTTH AM 770 every Sunday morning at 8:00. Rick is a frequent speaker and lecturer.

TINA HALL

JULIA REED

Julia serves the registered independent advisor and family office community on the West Coast. She has provided charitable planning consultation and resources to wealth management professionals and their clients for more than a decade. Julia is a subject matter expert on all aspects of effective philanthropy, including complex assets, legacy planning, and social impact strategy. Julia has spent more than 18 years in the financial services industry, working on two security exchanges and in private wealth management. She holds a BA in Business Administration from John F. Kennedy University.

DR. LAUREL BEEDON

Dr. Beedon recently retired from the Government Accountability Office (GAO) where she was a Senior Analyst in the Education, Workforce, and Income Security Division. Among her publications for the GAO are studies on the provision of home and community-based services and how the Social Security Administration delivers information to constituents. Her prior experience includes Senior Fellow at the National Academy of Social Insurance (NASI) where she led the Washington Internship program, Senior Research Fellow at WISER, and Senior Policy Adviser at the Public Policy Institute (PPI).

issues related to longevity and transition planning due to divorce and widowhood. Barbara has spent over a decade concentrated in long term care planning to encompass its potential impact on family and finances. Having taken care of her mother for 13 years, she has both personal and professional experience on the impact of caregiving.

PETE FINLON

Pete has over 40 years of experience in the corporate, non-profit, sports and startup world. He has held numerous executive positions in the healthcare field with companies like Abbott Labs and Amgen, as well as board positions with local non-profits. He is currently a founding member of the Retirement Coaches Association. As a certified retirement and transition coach, Pete's focus is on helping others make their next chapter in life their best one ever!

Tina has worked in the Senior Housing and Care field over 10 years, both at retirement communities and as an Eldercare Advisor, educating and helping older individuals and their families understand the various types of housing and care options available and how to access appropriate resources for whatever stage of life they are in. She is a Certified Senior Advisor, a NEST Board Member, a previous Senior Care Coalition Board President, and a very passionate advocate for seniors.

ED PERKINS

Ed conducted and managed aviation, travel, and tourism research from 1965 through 1985, during which time he and his wife, Eleanore, traveled extensively. With their combined backgrounds in travel and writing, they founded a travel newsletter, Economy Traveler. In 1985, Consumers Union took it over and morphed it into Consumer Reports Travel Letter, with Ed and Eleanore as co-editors. Under their leadership, it became one of the country's most respected and successful travel publications. Ed and Eleanore retired in 1998 and moved to Ashland, OR where Ed continues to write syndicated columns, contribute to smartertravel.com and rail-guru.com, and advocate on consumer travel issues.

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