UC Berkeley Retirement Center
Spring 2020 Pre-Retirement Planning Seminars

The Retirement Center coordinates a variety of pre-retirement seminars to help you prepare for the important transition of retirement. Find below a list of seminars for Sprint 2020, including "Pathway to Retirement" covering the nuts-and-bolts of retirement, "Planning for Life in Retirement" for considering life in retirement beyond finances, as well as seminars for faculty covering issues of work and academic transitions, transitions with family life and new or part-time employment.

For more details, go to: https://retirement.berkeley.edu/prp.

Date	Event	Audience	Location
Wednesday, 1/29/20 1:30 – 5:00 pm	Pathway to Retirement Event – Campus Live Webinar	Staff, academic appointees and faculty	Banatao Auditorium, Sibley Live Webinar
Tuesday, 2/4/20 1:00 – 4:30 pm	Pathway to Retirement Event - LBNL	LBNL employees	Building 50 Auditorium
Tuesday, 2/11/20, 2:10 – 4:00 pm	Planning for Life in Retirement	Staff, academic appointees, faculty, and LBNL	University Hall 150
Tuesday, 2/18/20, 2:10 – 4:00 pm	Medicare Overview for those Approaching Retirement	Staff, academic appointees, and faculty	University Hall 150
Tuesday, 3/3/20 & 3/10/20, 2:10 – 4:00 pm	Rethinking Retirement: 2-part Seminar for Faculty	Faculty	University Hall 150
Tuesday, 03/31/20, 4:30 – 6:30 pm	Berkeley Home Match Information Session	Staff, academic appointees, faculty, LBNL, and retirees	University Hall 150
Begins 4/17/20 Fridays, 9:30 – 11:30 am	Taking Charge of Your Future Self: Planning for Long-Term Care Course	Staff, academic appointees, faculty, LBNL, and retirees	University Hall 150

More details: https://retirement.berkeley.edu/prp
Questions? ucbrc@berkeley.edu. (510) 642-5461

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Taking Charge of Your Future:
Planning for Long-Term Care
Presented by the UC Berkeley Retirement Center

The best time to think about long-term care is before you need it. This 6-part series is designed to help you learn about a variety of considerations to meet your health or personal care needs during a short or long period of time. Sessions are held in 150 University Hall from 9:30 am to 11:30 am.

The series is designed to dive a little deeper into each topic through individual sessions and thus ideally participants should plan to attend the entire series. That being said if you are able to attend a majority of the sessions, please do sign up. Cary Sweeney, Director of the Retirement Center will serve as the lead moderator of the series. Following each session participants will be given a simple reflection exercise from the AARP Planning for Long-term Care Resource Guide (Worksheet starting on page 35). The first 15-20 min of sessions 2-4 will include discussion among the group related to the reflection exercise assigned at the last session.

- **April 17 Aging in Your Home -** According to AARP, nearly 90% of adults age 65+ want to stay in their current home and community as they age. This workshop will review considerations for staying in your home (e.g. home modifications, transportation, finances, community and programs like the "village" concept), weighing out the pros and cons of each and considering the cost. Presenter: Cary Sweeney, MS, Gerontology
- **April 24 Home Care and Care Management -** Learn about the resources needed to be proactive in planning your retirement to help ensure you can age in place. Included in the discussion will be geriatric care management, non-medical (private pay) home care, community support services, transportation, as well as the associated costs. Presenter: Anna Le Mon, MSW, MPH Geriatric Care Manager, Senior Alternatives
- **May 8 Senior Housing Options** - Are you considering on moving into a retirement community and would like to better understand the options? This workshop will review the difference between the various senior living communities (e.g. independent living, senior (age restricted) apartments, continuing care communities or "life care," assisted living, skilled nursing), what they cost, and the types of questions to ask. Presenter: Cary Sweeney, MS, Gerontology
- **May 15 Estate Planning -** Understand who needs estate planning assistance, the documents included and their purpose, estate taxes, retirement accounts, and the attorney-client relationship. A review of the Advanced Health Care Directive, Power of Attorney, Trust, Revocable Living Trusts, Last Testament and Will, and Estate Administration will be covered. Presenter: Kristen Southworth, JD
- **May 22 Budgeting for Long-Term Care -** Learn how to create a budget to help make decisions about your LTC, including understanding the various types of expenses in long-term care, review cases of how clients made their decisions about long term care and learn the importance of having an advocate. Presenter: Julie Menack, CMC, CLPF (Care Manager Certified/Aging Life Care Manager, California Licensed Professional Fiduciary)
- **May 29 Next Steps: Conversations about Community and Care -** Hear from a panel of experts and elders themselves who will share their ideas and experiences for gaining support in your community and care.

Register online or contact the UC Berkeley Retirement Center at 510-642-5461 or ucbrc@berkeley.edu or visit www.retirement.berkeley.edu.