Retirement Planning 101—How to Decide When it's Time

November 28, 2018 | 8:00 am to 11:30 am
Sutton Place Hotel—10235 101 Street, Edmonton, AB
(Ballroom—2nd floor)

Overview

Where are you now on your career horizon? Are you just getting started in the public service after completing your technical training or perhaps a degree? Are you mid-way in your journey and building on that experience? Or are you nearing the finishing line where your age and years of service now seem to indicate that the transition to retirement is within your grasp? Regardless of your positioning on that life spectrum, this is a presentation you won't want to miss. Retirement readiness is more than a financial equation. Our mindset and preparation over the course of our working lives will be key to setting us on the path for quality living in our golden years. Come hear about a new triple bottom line that will help you decide when it's time to retire.

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Agenda

Time	Activity
08:00–08:30	Hot Breakfast
08:30–08:35	FMI Welcome—Chapter President
08:35–08:40	Welcome Message—Moderator
08:40–10:00	**Rein Selles**, Retirement Services (St. Albert) - Hons BA (Recreation), University of Waterloo - MSc. (Human Ecology) - University of Alberta - Professional Retirement Planner (PRP)
10:00–10:20	Coffee Break
10:20–10:22	Moderator introduction for Angus Watt
10:22–10:52	**Angus Watt**, Managing Director, Individual Investor Services, National Bank Financial, and mentor of the Angus Watt Advisory Group – York University - Bachelor of Political Science
10:52–10:55	Moderator introduction for David Mulyk
10:55–11:15	**David Mulyk**, Executive Director, Pension Policy, Alberta Treasury Board and Finance - University of Alberta – MBA, Public Management, B. Sc., Math and Economics
11:15–11:30	Q & A Panel Discussion
11:30–11:35	Chapter President closing comments and prize draws
11:35	Session ends

Speaker Biographies

Rein Selles

Rein Selles Retirement Services (St. Albert) - Hons BA (Recreation), University of Waterloo - MSc. (Human Ecology) - University of Alberta - Professional Retirement Planner (PRP)

Rein is a retirement educator and he has been a leader in the development of retirement planning for over 35 years. His professional contributions have earned him Honorary Life Membership in Retirement Planning Association of Canada and recognition as a Distinguished Alumni of the University of Waterloo. He is co-author of the book, *10 Things I Wish Someone Had Told Me About Retirement*. Rein maintains a lifestyle and retirement planning practice out of his home in St. Albert *(reinsellesretirementservices.com)*.

When Less Can Mean More—An Alternative Approach To Planning Retirement

The question of "How much is Enough?" has puzzled every generation of Canadians approaching retirement since the 1960s. Financial institutions are quick to point to the insufficiency of Canadian retirement savings (2018) but do not offer any alternative approach to retirement when saving more may not be possible. Lifestyle planning takes a different perspective by evaluating the cost of living necessary at retirement and the way in which income from many sources may allow for an easier transition to retirement.

Angus Watt

Managing Director, Individual Investor Services, National Bank Financial Wealth Management CEO & Partner, Angus Watt Advisory Group

Angus Watt is Managing Director, Individual Investor Services, National Bank Financial, and mentor of the Angus Watt Advisory Group. He holds a degree in Political Science from York University.

Angus and his group manage over $1 Billion in assets, have over 130 years of combined market experience, and are specialists in Investment Management as well as Portfolio Strategy, Financial Planning, Individual Insurance, Group Insurance and Benefits planning. As Central Alberta's Business Authority, Angus broadcasts over 50 times per week on Global TV and 630 CHED.

Angus is Honorary Consul of the Kingdom of the Netherlands, Colonel of the South Alberta Light Horse regiment, Chair of the Edmonton Consular

Speaker Biographies

Corps, University of Alberta Chancellor's Cup 2017 Co-Chair, Military Cup 2017 Co-Chair, and 5th Annual Women Fore Pandas Golf Tournament Honorary Chair. Angus is currently an advisor to the Little Warriors Foundation and Past Advisor to the Hearing Foundation of Canada.

In his presentation, Angus will share his expert knowledge on managing your retirement nest egg and important things you need to know about unbundling registered plans and estate planning considerations.

David Mulyk

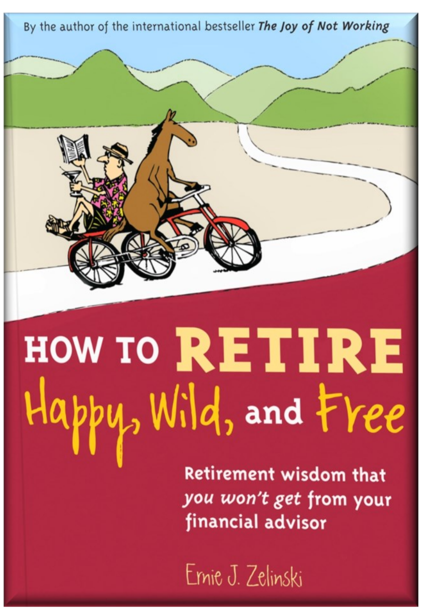
Executive Director of Pension Policy

Dave Mulyk is the Executive Director of Pension Policy, working in the Strategic and Business Services division with Treasury Board and Finance. He is also Alberta's representative on the Canada Pension Plan committee of Federal/Provincial/Territorial officials, which provides policy advice to Canada's Finance Ministers on matters concerning the Canada Pension Plan. He has been with Alberta Finance since 2001 and in his current role since June 2014. He holds a Bachelor of Science in Math and Economics, as well as an MBA, both of which were earned from the University of Alberta.

Alberta Treasury Board and Finance

In his presentation, David will share the latest updates on changes the government may be contemplating to the governance structure of some of Alberta's public sector pension plans to help support and maintain their long term security.

Added Bonus



The first 100 registrants for this session will receive a free copy of international best-selling author, Ernie J. Zelinski's book—***How to Retire Happy, Wild, and Free*** (Recommended Summer reading in the Wall Street Journal July 2018).