



Kentucky Conference

The United Methodist Church

Benefits Summit Agenda

Monday, March 21, 2022	
8:30 am to 9:00 am	Gathering and Check-In
9:00 am to 9:10 am	Welcome and Introductions, Day 1 David Garvin, Treasurer Kentucky Annual Conference
9:10 am to 10:40 am	Pre-Retirement Pension Bob Christophel and Frank O'Brien Wespath Benefits & Investments
10:40 am to 10:50 am	Break
10:50 am to 11:20 am	Benefits Access Portal Demo, Active Participants Bob Christophel and Frank O'Brien Wespath Benefits & Investments
11:20 am to 12:10 pm	HealthFlex & Wellbeing Bob Christophel and Frank O'Brien Wespath Benefits & Investments
12:10 pm to 1:00 pm	Lunch
1:00 pm to 2:30 pm	Achieving Financial Wellness EY
2:30 pm to 2:40 pm	Break
2:40 pm to 4:00 pm	Achieving Financial Wellness (continued) EY
4:00 pm	Wrap-Up, Day 1

All times are eastern.

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Tuesday, March 22, 2022	
9:00 am to 9:30 am	Gathering and Check-In
9:30 am to 9:35 am	Welcome and Introductions, Day 2 David Garvin, Treasurer Kentucky Annual Conference
9:35 am to 9:45 am	Annual Conference Need-to-Knows Lesley Williams, Benefits Administrator Kentucky Annual Conference
9:45 am to 11:15 am	Retirement and You Bob Christophel and Frank O'Brien Wespath Benefits & Investments
11:15 am to 11:25 am	Break
11:25 am to 12:10 pm	Benefits Access Portal Demo, Retirement Bob Christophel and Frank O'Brien Wespath Benefits & Investments
12:10 pm to 1:00 pm	Lunch
1:00 pm to 2:00 pm	Social Security & Medicare Kay Tong Social Security Administration
2:00 pm to 3:00 pm	Retiree Health Bob Christophel and Frank O'Brien Wespath Benefits & Investments
3:00 pm to 4:00 pm	Are My Affairs in Order? David Bowles, President Kentucky United Methodist Foundation
4:00 pm	Wrap-Up, Day 2

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