Planning for Retirement Roundtable

Discussed the following points:

- Figuring out social security and Medicare is complicated
- Even when you love the work you do and people you work with, at some point a fatigue factor sets in and there are other places you may wish to put your energies
- It is important to plan ahead for your finances, expected expenses, place you want to live, etc.
- It may help to speak with a financial manager from one of your retirement plans to get advice and/or consolidate assets
- You may also need to know how withdrawing funds at different ages affects your income tax rates
- If you don’t have a lot of regular medical bills, switching over to a Health Savings Plan for health insurance could help you put away more funds to be used later (once you retire they don’t have to be used only for medical expenses)
- It is sometimes difficult to plan for yourself when you are still dealing with aging parents