



**POWER & ENERGY/INDUSTRY APPLICATIONS SOCIETIES
CONSULTANT'S NETWORK AFFINITY GROUP AND PACE
NEW YORK SECTION**



You are invited to a JOINT MEETING of the PES & IAS NY Chapter, NY Section Consultant's Network Affinity Group and PACE on:

What Baby Boomers Need to Know to Maximize Retirement Income

Tuesday, April 28th, 2015

THE PRESENTATION:

Baby Boomers are asking...

- Will Social Security be there for me?
- How much can I expect to receive?
- When should I apply for Social Security?
- How can I maximize my benefits?

At this workshop you will learn...

- 5 factors to consider when deciding to apply for benefits
- When it makes sense to delay benefits—and when it does not
- Why you should always check your earnings record for accuracy
- How to estimate your benefits
- Two innovative strategies for coordinating benefits with your spouse
- How to minimize taxes on Social Security benefits
- How to coordinate Social Security with your other forms of retirement income

THE SPEAKER: Robert Leitner, CFP

Robert Leitner is a Certified Financial Planner and Registered Investment Advisor with over 30 years' experience in the financial services industry specializing in Retirement Income Planning. He is currently on the Board of Directors of the Westchester Estate Planning Council and Co-Chairs the Elder Law/Economic Security Council in Westchester. He is also a member of the Senior Law Day committee. Mr. Leitner has also taught adult education courses on Retirement Distribution at Purchase College. He is also a member the Financial Planning Association. During the past year, Mr. Leitner has spoken at the N.Y State Senior Lawyers Association, the Institute of Electrical and Electronic Engineers (IEEE), Phelps Memorial Hospital, The Bristol Assisted Living, The Successful Aging Conference and Financial Planning Week.

ALL ARE INVITED – PLEASE POST

RSVP: email preferred
PES/IAS: Arnold Wong, wongar@coned.com
NY Consultant's: Martin Izaak, M.Izaak@IEEE.org
PACE: Robert Pellegrino, Bob.Pellegrino@IEEE.org

FOR SECURITY REASONS: NO WALK-INS!

When: 5:00 pm — Refreshments & Program

7:00 pm — Program Ends

Where:

Con Edison
Room 1425
4 Irving Place, New York, NY 10003
Nearest Subway: 14th St/Union Sq.

This program will NOT be awarded IEEE Continuing Education Units.

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