

LEE HECHT HARRISON

Joint Meeting of Senior Job Search Work Teams

Thursday, February 19, 2009

From	To	Topic	Speaker
10:00	10:05	Introductions: <ul style="list-style-type: none">• Sign in• Welcome and Introduction of Speakers	Lloyd George Lee Hecht Harrison Princeton
10:05	10:45	Managing Personal Finances During Transition: <ul style="list-style-type: none">• Cash flow discipline/discretionary spending• Alternative sources of income• Fighting procrastination Taxes: <ul style="list-style-type: none">• 2008 Tax Tips• 2009 Tax Planning Ideas• Estate Planning Tips	Ken Shapiro, CPA/PFS, CFP Shapiro Financial Security Group
10:45	10:55	BREAK	
10:55	11:35	Managing Your Investments: <ul style="list-style-type: none">• Minimizing further damage• Positioning for upside• Rollovers• “201 k’s”• Investment outlook• Fighting procrastination	Jim Sedam Financial Advisor Northwestern Mutual Financial Network
11:35	11:50	“Ask the experts”	Ken and Jim
11:50	12:00	Wrap up	Lloyd George
12:00	1:00	Networking	Attendees