



ALTAIR

Altair Virtual Spring Forum 2021

Leave Nothing to Chance: Proactive Planning for Longevity

Wednesday, April 21st & Thursday, April 22nd
10am-12pm CT

Leave Nothing to Chance: Proactive Planning for Longevity

Agenda

DAY ONE

Overview of Issues

10:00 – 10:15am Welcome and Introduction

10:15 – 11:00am **What's Involved? A Comprehensive Framework for Longevity Planning**
James Grubman, PhD, Neuropsychologist, Founder, Family Wealth Consulting

11:00 – 11:05am Break

11:05 – 11:45am **Tips for Discussing Aging Issues as a Family**
An interview with Mardy Chizek, RN, FNP, Founder, Charism Eldercare Service Case Manager, Eldercare Navigator

11:45 – 12:00pm Q&A with Speakers

Agenda

DAY TWO

Interactive Workshop

10:00 – 10:15am Welcome and Introduction to Day Two

10:15 – 11:00am **Making Choices and Documenting Decisions Before They Are Needed**
James Grubman, PhD, Neuropsychologist, Founder, Family Wealth Consulting

11:00 – 11:05am Break

11:05 – 11:45am **Stories from the Front Lines: Perspectives on Aging Issues from Different Disciplines**
*Rebekah Kohmescher, CEO, Altair Advisers
Joanne Dunphy Flynn, Founder, Consultants on Disability*

11:45 – 12:00pm **From Hope to Action – Implementing Your Top 3 Priorities**
James Grubman, PhD, Neuropsychologist, Founder, Family Wealth Consulting

12:00pm Program Adjournment

About Altair

Altair Advisers is an independent wealth advisory firm providing investment management, financial planning and client education services. We counsel a select group of individuals, families, foundations and endowments. As a fiduciary, we serve as an advocate for our clients, providing objective advice and comprehensive guidance across all aspects of our clients' financial lives.