



**Brandeis**  
UNIVERSITY

## Retirement Planning Day Agenda

Thursday, October 9, 2025

Time	Presentation	Speaker
10:00 a.m. – 10:10 a.m.	Welcome & Opening Remarks	Brandeis University Human Resources
10:10 a.m. – 11:00 a.m.	Social Security 101: Everything You Wanted to Know	LaShonda Downing, Social Security Administration
11:00 a.m. – 11:10 a.m.	<i>Break</i>	
11:10 a.m. – 12:00 p.m.	Estate Planning: Preserving Your Savings for Future Generations	Kristin Matsko, Fidelity Investments
12:00 p.m. – 12:10 p.m.	<i>Lunch</i>	
12:10 p.m. – 1:00 p.m.	Fundamentals of Retirement Income Planning	Matthew Greeke, Fidelity Investments
1:00 p.m. – 1:45 p.m.	Prepare for the Reality of Healthcare in Retirement	Devan Gould, Fidelity Investments
1:45 p.m. – 2:00 p.m.	<i>Complete Surveys &amp; Wrap-Up</i>	

