November 17, 2016 Meeting

The next regular program for the Knoxville Estate Planning Council will be held on Thursday, November 17, 2016, at Cherokee Country Club

Meet and greet 5:15 PM   Dinner: 5:45 PM   Presentation: 6:00 PM

Millennials: Journey From Saving to Retirement

Speaker: Lena Rizkallah — J.P. Morgan Asset Management Individual Retirement

Lena Rizkallah will share findings from research regarding how to think about a satisfactory savings range for Millennials at various income levels, and how to help the generation think about investing and retirement planning. Additionally, Lena will discuss how our research suggests financial professionals should think about helping Millennials when planning for saving and retirement.

Course Objective: To understand the headwinds and challenges facing Millennials – from the delay for many to begin a career, to stagnant wage growth & income, to the accumulation of debt and lack of savings, and the generational conservatism around investing.

Lena Rizkallah, Vice President, is a Retirement Strategist on J.P. Morgan Asset Management Individual Retirement team. A recovering attorney, Lena has been writing and presenting on financial planning, trust and estate planning strategies, tax and fiscal policy and charitable giving arrangements since 2000. In her current role, she is responsible for developing and communicating timely insights on retirement planning topics, and has a unique ability to synthesize complex concepts and deliver them in a clear, actionable format. In her past work, she founded Mosaic Consulting where she continued to work with advisors on advanced planning strategies, and Money Moxie which focused on educating women and small businesses on personal finance and investing. She also served as Regional Vice President for Prudential Annuities, and as Director of Estate & Charitable Planning at John Hancock Financial. Lena earned a BA from the University of Maryland and a JD from Widener University.

New Venue

REMINDER: new venue! Please note that the meetings will now be held at Cherokee Country Club, 5138 Lyons View Pike, Knoxville, TN 37919.

Member Contact Information

KEPC's main form of communication is email. If any of your profile information changes, especially your email, please update the necessary information on the KEPC website (kepctn.org). Meeting announcements, membership renewals, and other information is delivered via email. Please do not uncheck the "Contact Preference" for email under "Contact Information" . This feature allows KEPC to send emails to members but will not display your email if that is your preference. Regular meeting announcements are sent out in January, March, May, September, and November. Membership renewals are sent out in August. If you stop receiving regular emails, please contact Carol Bangash.

Please RSVP no later than 12:00 PM Monday, November 14 , 2016. Reservations taken after November 14, 2016, will **NOT** include dinner. If a reservation needs to be canceled, notification must be sent no later than 12:00 PM Monday, November 14, 2016, or the member will be billed $35 for the cost of the dinner. Guests are welcome to attend the meeting with a member. There is a guest fee of $10 for students and emeritus members. If a guest reservation needs to be canceled, notification must be sent no later than 12:00 PM Monday, November 14, 2016, or the member is responsible for the $35 or $10 charge. To register for this course, go to **kepctn.org**, or call 865-474-7360.

Knoxville Estate Planning Council next meeting scheduled for January 19, 2017

Delivery Method: Group Live
Program Level: Basic
Prerequisites: None
Advanced Preparation: None
CLE Credit: 1 hour General
CLU Credit: 1 hour General
CPE Credit: 1 hour Tax

Due to this program being presented free of charge, there will be no refunds issued. For more information regarding refund, complaint and program cancellation policies, please contact our offices at 865-474-7360.

Knoxville Estate Planning Council is a registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org

Knoxville Estate Planning Council

PO Box 53164
Knoxville, TN 37950
Phone: 865-474-7360
Fax: 865-691-3064