

TRANSITIONING! RETIREMENT

Overcoming the non-financial challenges

A Virtual Symposium

Session Descriptions and Speakers' Bios



Marianne Oehser
Your host

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Day 1

Session 1: Today's "Retirement": how it's different

In this session you will hear about:

- How the reality of retirement is shifting
- The concept of "unretirement" and how it benefits everyone
- The importance of encore careers and Third Age Entrepreneurs
- How to prepare for unretirement



Chris Farrell

Chris Farrell is senior economics contributor at Marketplace, American Public Media's nationally syndicated public radio business and economic programs. He is economics commentator for Minnesota Public Radio. An award winning journalist, Chris is a columnist for Next Avenue and the Star Tribune. He has written for a number of other media outlets. The author of four books, his latest is *Unretirement: How Baby Boomers are Changing the Way We Think About Work, Community and the Good Life*.

Session 2: What the Transition Often Looks Like and Why

In this session you will hear about:

- Why transitions are often a difficult time – even when you looked forward to the change
- The phases we encounter as we move through a significant transition
- Tips for making through the transition successfully
- The six forms retirement can take



**Nancy Schlossberg,
EdD**

Dr. Schlossberg is an expert in the areas of adult transitions, retirement, career development, adults as learners, and intergenerational relationships.

Her books include *Revitalizing Retirement: Reshaping Your Identity, Relationships, and Purpose*, *Overwhelmed: Coping with Life's Ups and Downs*, *Retire Smart: Retire Happy: Finding Your True Path* just to name a few. Her forthcoming book is *Too Young to be Old*.

Dr. Schlossberg has appeared on PBS' *In the Prime*, Derek McGinty's national talk radio show, *CBS Evening News*, *CBS This Morning*, the NBC Knowledge Series. She has delivered more than 100 keynote addresses and is the recipient of many honors and awards.

Day 1

Session 3: The Importance of Purpose

In this session you will hear about:

- What having a purpose really means
- Benefits of having a purpose
- The risks of not having a purpose
- How you can make living on purpose an everyday thing



**Vic Strecher,
PhD, MPH**

Dr. Strecher is Professor and Director for Innovation at the University of Michigan School of Public Health. In 1995, he founded the University of Michigan's Center for Health Communications Research, a research-focused organization.

In 1998, Dr. Strecher founded HealthMedia, an Ann Arbor-based company that has grown to over 185 employees, creating digital health coaching programs for millions of users. In 2008 HealthMedia was purchased by Johnson & Johnson.

As Director for Innovation at UM, Dr. Strecher is working to create an environment that promotes more direct dissemination of research efforts to improve the public's health nationally and globally. He is also Visiting Professor at the Peking University's School of Public Health.

Dr. Strecher's latest research and book is related to the importance of developing and maintaining a strong purpose in life. His book, *On Purpose*, is written for the lay public with a professional comic illustrator as a graphic novel and is accompanied by a free iOS app, a website and smartphone and web apps.

Day 1

Session 4: How to Achieve Purpose and Power in Retirement

In this session you will hear about:

- Why it's important to have a realistic retirement vision and not just an idealized image from a retirement ad
- Some of the myths about what retirement will be like
- How to go about choosing a new purpose for your life
- Some ideas about what can make your life feel fulfilling you can make living on purpose an everyday thing



Dr. Harold G. Koenig is currently Professor, Psychiatry & Behavioral Sciences and Associate Professor, Medicine at Duke University. He is a highly acclaimed expert in the fields of geriatrics, mental health and religion and a prolific author with over 400 scientific peer-reviewed publications, nearly 70 book chapters, and 40 books, including *Purpose And Power In Retirement: New Opportunities for Meaning and Significance*.

His research on religion, health and ethical issues in medicine has been featured on dozens of national and international TV news programs (including ABC's World News Tonight, Dr. Oz Show, and several times on The Today Show, Good Morning America, and NBC Nightly News), over a hundred national or international radio programs, and hundreds of newspapers and magazines (including Reader's Digest, Parade Magazine, Newsweek, Time, and Guidepost). He has also received many prestigious awards.

Dr. Koenig completed his undergraduate education at Stanford University, nursing school at San Joaquin Delta College, medical school training at the University of California at San Francisco, and geriatric medicine, psychiatry, and biostatistics training at Duke University Medical Center.

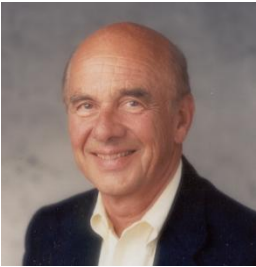
**Harold G. Koenig,
MD, MHSc**

Day 2

Session 1: Building Your Life Portfolio After Your Career

In this session you will hear about:

- What it means to graduate into retirement
- Six principles that are manifest in the lives of people who successfully grow into this phase of their lives – and the one that is really the core of their growth
- Designing a Life Portfolio and what that is so important



**William A. Sadler,
PhD**

Dr. Sadler is a leader, teacher, author, consultant, and elder. He is a prominent socialist who has had a distinguished career as an award winning scholar and educator.

Dr. Sadler is the author with dozens of articles and six books, the last three are based on 25 years of research about people transforming aging by creatively redesigning the second half of life. This groundbreaking work has been reissued in paperback and translated into German and Dutch.

His latest book, *Changing Course: Navigating Life After 50*, focuses on people who are continuing to grow in their 60s and 70s and creatively redefining retirement. Dr. Sadler and his co-author, James H. Krefft, Ph.D., have been working with professions and organizations to develop third age careers. Dr. Sadler is a founding member and Director of Research, The Center for Third Age Leadership.

After receiving his doctorate from Harvard in 1962, Dr. Sadler taught sociology, business, and interdisciplinary courses in universities and colleges in the United States and Canada. He has held numerous academic administrative positions.

Day 2

Session 2: Options for Meaningful Work in Retirement

In this session you will hear about:

- Why some people resist working in retirement
- The process for creating this new phase of your life
- Five options for working in retirement



Carolee Duckworth, PhD

Dr. Duckworth spent her long career working to empower people to become their own more complete and fulfilled selves. To this end, she co-created the Common Cause Award winning “Center for Re-employment Services,” serving displaced workers, displaced homemakers, and 55+ career changers, stimulating their mental capabilities to prepare them to select and enter new careers.

Carolee also designed and redesigned courses and programs for Technical Colleges and she created and launched College Online (www.College-Online.com)

Carolee is the author of *Shifting Gears To Your Life and Work After Retirement*. Since she “shifted gears” herself, Carolee has focused on writing articles, courses and books to empower individuals of all ages to reach for their dreams.

Session 3: What it Takes to be Happy in Retirement; The one thing you need to know

In this session you will hear about:

- The key to happiness -- especially in retirement
- What is a "happiness set point" and how can you change yours
- How to maintain happiness when adversity hits
- Building happiness into your relationships



Donna Daisy, PhD

Dr. Daisy is a psychologist, life coach, author, and professional speaker. She believes that the best way to predict the future is to create it.

Donna’s doctoral studies on resilience, clinical training in stress management at Harvard Medical School Institute of Mind/Body Medicine, and studies in the field of Positive Psychology provide the background for her lectures and her books, *Why Wait? Be Happy Now!* and *Rise Above It: Five Powerful Strategies for Overcoming Adversity and Achieving Success* More recently Donna has pursued research into the topic of aging consciously.

In all of the ways she touches people Donna encourages others to embrace their personal power, make life changing choices, and take the necessary action to create the results they want in their lives.

Day 2

Session 4: “Findependence” – work while you play; play while you work

In this session you will hear about:

- What Findependence means and why you might be interested in it
- What does the Victory Lap retirement picture look like?
- A new model for planning for retirement
- Secrets about how to transform a boring traditional retirement into an exciting one



**Michael Drak and
Jonathon Chevreau**

Jonathan Chevreau is a veteran financial columnist, blogger and author based in Toronto. He has published two American editions of his books and ebooks: [Findependence Day](#) (Trafford.com) and [A Novel Approach to Financial Independence](#) (Amazon.com). In 2014, he launched the [Financial Independence Hub](#), which covers the topic from a North American perspective. (Half the traffic is from the US and it features guest bloggers from both the US and Canada).

Jon has also authored several books with traditional book publishers, including *The Wealthy Boomer*. In 2016 he will be publishing his latest book about life after Financial Independence: *Victory Lap Retirement*, co-authored with Michael Drak.

Since declaring his personal Findependence Day in May 2014, he has been blogging for the Motley Fool, Financial Post, MoneySense.ca, Money Magazine (Money.ca) and InvestorEd.ca. He was the Financial Post’s personal finance columnist between 1993 and 2012, and editor-in-chief for *MoneySense* Magazine from 2012 to 2014. He has a large Twitter following at @jonchevreau and uses most other major social media platforms. He’s a member of the Port Credit chapter of Toastmasters.

Mike Drak is a 38 year veteran of the financial services industry. His core message is that the version of retirement being sold to us today is unnatural. It’s a man made solution to a man made problem which is in direct conflict with our natural instincts. Victory lap is his solution to the problem, which involves the creation of a lifestyle based on some combination of work and play that gives people what they need to enjoy a satisfying life.

Mike works with his wife "The Contessa" in a Wealth Management group in Toronto Canada.

Day 3

Session 1: How Not to Kill Each Other: Important conversations to have about your retirement transition

In this session you will hear about:

- How to deal with changing identities of you, your significant other, and both of you as a couple
- The importance of an individual and shared vision
- The best way to communicate expectations of each other (time together and time apart, appreciating each other's differences)
- How to have difficult conversations with important people (where neither of you assumes what the other is thinking)
- How to discuss the timing of your retirement



Dr. Mintzer loves helping self-reliant women, men and couples reinvent themselves in the next stage of life.

She's the founder of the Boomers and Beyond Special Interest Group for interdisciplinary professionals and co-author of *The Couple's Retirement Puzzle: 10 Must- Have Conversations for Creating an Amazing New Life Together* and a contributing author to a number of other books.

Dorian Mintzer, PhD

She is a member of the National Speakers Association and The Life Planning Network, among others, and is a sought after speaker, coach and consultant.

Through her web site, RevolutionizeRetirement.com, she offers the 4th Tuesday "Revolutionize your Retirement Interview Series with Experts to Help You Create a Fulfilling Second Half of Life" and comprehensive coaching programs to individuals and couples in person and over the phone, as well as groups and workshops and is available for keynotes, seminars and break-out sessions.

Day 3

Session 2: Family Relationships in Retirement

In this session you will hear about:

- Some of the challenges women face as they move into retirement
- Issues we face when we have aging parents and boomerang kids – and some solutions for dealing with it
- How to keep a balance between caring for others and nurturing ourselves
- Challenges that couples face as they retire



Phyllis Goldberg, PhD
Rosemary Lichtman, PhD

Phyllis Goldberg, Ph.D., a marriage and family therapist, and Rosemary Lichtman, Ph.D., a psychologist, consult online at HerMentorCenter.com, offering insights into challenging family dynamics, particularly to women of the Sandwich Generation. Having guided thousands of clients in their individual private practices, they offer a wide range of professional knowledge and experience. They have been blogging for 10 years and host a monthly newsletter, *Stepping Stones*. They have recently published *Whose Couch Is It Anyway? Moving Your Millennial*. It is a joint collaboration about letting go of boomerang kids and teaches smart strategies to help tackle family transitions head-on.

Both authors have raised children and cared for aging parents and grandchildren. Their identities, like those of their clients, have been redefined subtly yet dramatically over the years. In addition to her private practice, Phyllis Goldberg has worked with students and families in Vietnam, Tanzania, Ecuador, The Cook Islands and St Lucia. Rosemary Lichtman, retired from her private practice of Health Psychology, is currently Adjunct Clinical Assistant Professor of Family Medicine at the Keck School of Medicine of the University of Southern California, where she teaches medical students.

Day 3

Session 3: Planning for Retirement Beyond the Money

In this session you will hear about:

- Why it helps to plan for the non-financial side of retirement
- Some tips for doing it
- How to overcome the biggest fears and challenges of the transition into retirement.



Dave Bernard

Dave Bernard is a California born and raised author and blogger with an extensive 30 year career in Silicon Valley. He has written more than 300 blogs for US News & World *On Retirement* and his personal blog *Retirement – Only the Beginning*. Candid feedback and thousands of comments from readers has given him a unique glimpse into the realities and challenges that all retirees will ultimately face, inspiring his book [I Want To Retire! – Essential Considerations for the Retiree to Be](#).

His other books include *Are you Just Existing and Calling it a Life?* and *Navigating the Retirement Jungle*.

Dave was a contributing writer for the books *65 Things to do when you Retire* (“*Positive Aging – Old is the New Young*”) as well as *65 Things to do when you Retire – TRAVEL* (“*Travel to Discover your Family Heritage*”).

He has been quoted in various articles and magazines including The Wall Street Journal, The Times of India, Prevention Magazine and Erickson Tribune.

Day 3

Session 4: Successful Aging: Why the old picture is wrong now

In this session you will hear about:

- What it means to live an authentically healthy life
- What is needed for successful aging
- Four components to aging well
- The kind of life-style choices we should be making in this phase of our lives



**Roger Landry,
MD, MPH**

Dr. Landry is a preventive medicine physician, author of award-winning *Live Long, Die Short: A Guide to Authentic Health and Successful Aging* and President of **Masterpiece Living**, a group of multi-discipline specialists in the field of aging who partner with organizations to assist them in becoming destinations for continued growth and Centers for Successful Aging. Trained at Tufts University School of Medicine and Harvard University School of Public Health, Dr. Landry specializes in building environments that empower older adults to maximize their unique potential.

He has been featured nationally and internationally on radio and TV with **NBC, FOX News, ABC and CBS** as well as **BBC, Growing Bolder, 2GB radio (Australia), and Radio Live and Tumeke FM (New Zealand)**. Dr. Landry has also written exclusive articles, and been called on as an expert in the field of aging by publications such as *Esquire Magazine, Los Angeles Daily News, Senior Planet, Journal of Aging and Health, Denver Post, About.com –Assisted Living, Expert Beacon, eHow, ThirdAge* and *MBLN*.

Dr. Landry is regularly featured in *US News and World Report, Huffington Post (US/Canada)* and *GRAND Magazine*. His book, *Live Long, Die Short* has been endorsed by **AARP**, is a **Living Now Book Award Gold Medal Winner** and was a **2014 Top Pick** in *MORE* magazine.