Center for REALTOR® Financial Wellness Retirement Summit 2021

Each REALTOR® has a unique vision for retirement. Proactive planning is the first step towards bringing that vision to life. Register now to attend NAR's Center for REALTOR® Financial Wellness Retirement Summit, featuring Morgan Stanley® experts. This four-part virtual series in July will help you shape your vision for retirement and develop steps to ensure your finances are set for the long-term.

Join Mike Engel, Institutional Consulting Director and Director of Corporate Retirement, and Jim Phillips, SVP Wealth Management Financial Advisor and Senior Investment Management Consultant, as they talk about retirement basics, tips for pre-retirees, and investment strategies for independent contractors. The event consists of four one-hour webinars, every Wednesday in July starting at 2 p.m. ET.

July 7, 2-3 p.m. ET
Retirement Planning Basics (Targeted for New Agents)

Saving enough for a comfortable retirement is one of most people's greatest financial goals—and challenges. This session covers the basics, such as planning ahead, learning the essential tenets of investing and understanding popular retirement accounts.

July 14, 2-3 p.m. ET
Getting Retirement Ready (Targeted for Seasoned Agents)

What does the ideal retirement look like? It all depends on your needs and wants. This session discusses everything from the basic considerations for retirement to how to help protect y ourself against the unexpected as you near retirement.

July 21, 2-3 p.m. ET
Planning for the Unexpected (Targeted for New Agents)

Life is full of surprises. While we may not be able to predict sudden expenses, we can prepare for them to soften their impact. This session covers ways that individuals and families can protect themselves when "life happens," with tips on building an emergency fund, exploring insurance options and more.

July 28, 2-3 p.m. ET
Legacy and Estate Planning (Targeted for Seasoned Agents)

Life happens quickly. Making it a priority to coordinate one's financial and estate plans can be overwhelming. This seminar can help individuals learn how to balance their goals and provide for the people and causes they care about most.

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