

Home Sweet Home: Housing Strategies in Retirement

AGENDA

- 9:30–9:50 a.m. **Registration and Continental Breakfast**
- 9:50–10:00 a.m. **Opening Statement**
Speaker: Jim Freeman, CFP®
President of Financial Alternatives
- 10:00–10:05 a.m. **The Road Map of Aging**
Speaker: Ellen Li, CFP®
Wealth Advisor at Financial Alternatives
- 10:05–10:40 a.m. **There's No Place Like My home**
Speaker: Fritz Gros-Daillon, MS, CSA, CAPS
CEO of Household Guardians, Author of Grace and Grit
- 10:40–10:50 a.m. **Q&A & Break**
- 10:50–11:25 a.m. **Retirement Communities & Assisted Living in San Diego**
Speaker: Julie Derry, Senior care Consultant at Care Patrol
- 11:25–11:35 a.m. **Q&A**
- 11:35–11:45 a.m. **Resources & Tools**
Speaker: Chris Jaccard, CFP®, CFA
Wealth Advisor at Financial Alternatives
- 11:45 -12:00 p.m. **Discussion & Wrap-up**