

# PASSPORT *to* RETIREMENT®

## Your “How-to” Guide for Financial Success

What’s on Your Retirement Horizon?  
*Gain Access to Proven Retirement Strategies*

Are you doing all you can to help make your retirement dreams come true? Unfortunately, for many of us the answer is no! The breath of financial information that’s available today can be overwhelming. And it’s often difficult to know what course of action is right for you.

Fortunately, retirement planning does not have to be complicated or confusing. Our workshop, *Passport to Retirement*, will help you evaluate your current situation and start to be proactive about setting and pursuing your retirement goals.

***Passport to Retirement* is your direct route to:**

- ▶ **Setting specific retirement goals**
- ▶ **Determining the income you’ll need**
- ▶ **Identifying sources of retirement income**
- ▶ **Steering clear of common roadblocks**
- ▶ **Choosing appropriate investments**
- ▶ **Preserving your assets**
- ▶ **Providing for your family and heirs**

The workshop is FREE to Lab Employees – there is no cost or obligation. The workshop does have a \$25 materials cost for the 145-page retirement planning color binder. This information-rich guide contains helpful checklists, self analysis quizzes, charts, and worksheets to help you manage your retirement planning.

**Sponsored by the LBNL Benefits Office and the Berkeley Lab Institute (BLI)**

**(\$25 – cash only – materials fee to be paid at the workshop)**

**Thursday, July 17<sup>th</sup> 2008**

**Workshop Location – Building 2, Room 100B  
1:00 pm – 4:30 pm**

**[Space is limited. Please pre-register for the workshop via Employee Self Service](#)**



### **WORKSHOP LEADER:**

George M. Noceti is a Financial Advisor with Morgan Stanley in Walnut Creek, California and is a seminar leader pioneering “Financial Education with a Purpose”. In addition to advising individuals, couples and Bay Area business, George is an instructor at UC Berkeley teaching in the Personal Financial Planning Department and also presents retirement planning workshops at employers’ worksite. George specializes in retirement planning and helps individuals develop an action plan to meet their retirement objectives.



**For More information Contact: LBNL Benefits Office, ext. 6403**