



List of Retirement Speaker Bureau presenters and expertise
for retirement-specific conferences, meetings, and events

Aikin, Blaine, AIFA®, CFA, CFP® – Fiduciary Responsibility Expert
Allen, Matthew – CEO, Social Security Advisors
Appleby, Denise, APA, CISP, CRPS, CRC®, CRSP – IRA Strategies for Mistakes Prevention Expert
Armes, David, CFP® – Medicare Counseling
Blanchett, David, CFA, CFP®, AIFA – Head of Retirement Research, Morningstar Investment Management
Bogosian, Carol, ASA, EA, MAAA, President of CAB Consulting – Retirement Risk Expert
Breeding, Brad CFP®, – Expert on Retirement Planning and the Senior Living Industry
Cloke, Curtis, CLTC, LUTCF, RICP – Retirement Income Expert
DiCenzo, Jodi, CFA, CPA – Behavioral Finance Expert
Falk, Michael, CFA, CRC® – Behavioral Finance and Investment Management Expert
Finke, Michael PhD, CFP® – Retirement Investing Expert
Fisher, Erin – President and Founder of Find Medicare Plans, LLC.
Franklin, Mary Beth, CFP® – Expert on Social Security Claiming Strategies
Giordano, Shelley – Chair of the Funding Longevity Task Force
Greenwald, Matthew, PhD – Retirement Research Expert
Hogue, Rex L., Attorney – Estate Law Expert
Horan, Stephen, PhD, CFA, CIPM – Managing Director, Credentialing, CFA Institute
Hounsell, Cindy, JD – Women and Retirement Advocate and Expert
Keebler, Robert, CPA/PFS, MST, AEP, CGMA – Estate Tax and Retirement Distribution Planning
Kessler, David M. – Elder Fraud Expert
Kruger, Annalee – President, Care Right Inc.
Macqueen, Alexandra, CFP® – Personal Finance Author & Expert
Mastrogiovanni, Ron – Health Care Impact Expert
Meredith, Betty, CFA, CFP®, CRC® – Advocate for Retirement Security of the Mid-Market
Nelson, John E. – Purposeful Retirement Author and Advocate
Pfau, Wade, PhD, CFA – Leading educator and researcher on retirement income
Ramthun, Roy, MPH – Health Savings Account (HSA) Expert
Rappaport, Anna, FSA, MAAA – Post-retirement Needs and Risks Thought Leader
Reichenstein, Dr. William, CFA – Social Security Strategies Expert
Salter, John, PhD, CFP, AIFA – Standby Reverse Mortgage Expert
Samalin, Andrew, CFP®, EA, CDFA™ – Expert in Divorce and Retirement
Schreiber, Heather, RICP® – Founder and President, HLS Retirement Consulting, LLC
Seibert, Kevin S., CFP®, CRC®, CEBS – Retirement Planning and Income Management Expert
Shagrin, Steven, JD, CFP®, CRPC®, CRC®, RLP®, CMC – Experienced Retirement Presenter for Consumers
Stahl, Peter, CFP®, Founder, Bedrock Business Results; WealthWatch – Retirement Health Care Needs Expert
Tabers, Joe, CSP – Effective Presentations Skills and Retirement Counseling Skills Expert
Timmermann, Sandra, EdD – Successful Aging in Retirement Expert
Vasileff, Lili, CFP®, MAFF, CDFA® – President, Divorce and Money Matters, LLC
Vernon, Steve, FSA – Expert in Strategies that integrate CD Plans, Social Security and QLACs
Votava, Dr. Katy – President, and founder of GOODCARE.com®
Woodland, Amber, Esq. – Elder Law Expert

Inquire about any of the above speakers by submitting form at www.retirement-speakers-bureau.com
Or phone 847-686-0440 x102 M-F or email bmeredith@retirement-resource-center.net