



# UMGC Financial Wellness Day Agenda

**Wednesday, July 20, 2022 | 1:00 to 4:00 PM ET**

UMGC Financial Wellness Day is organized by the University of Maryland Global Campus (UMGC), Finance and Economics Department, and the Financial Planning Association, National Capital Area (FPA NCA). It is the first of its kind event to provide highly qualified CERTIFIED FINANCIAL PLANNER™ professionals accompanied by registered UMGC Certified Financial Planner (CFP) students to meet with you one-on-one to offer free personalized advice on a variety of financial topics, including – getting out of debt, retirement planning, investment strategies, tax issues, insurance, and estate planning, among many others. The event will also feature a series of classroom-style educational workshops in the virtual auditorium addressing key personal finance topics.

**[Click Here Registration is Open Now!](#)**



**Welcome to The Conference Center**

**1:00 to 4:00 PM ET      One-On-One Advising**

**Select an adviser and schedule your appointment**



# [Click Here](#) for Instructions for Making Your Financial Adviser Appointment

## Welcome to the Main Auditorium



1:00 to 1:45 PM ET “Uncovering Social Security Secrets”  
Speaker: Marcia Mantell



2:00 to 2:45 PM ET “Options for Buying or Refinancing Your Home”  
Speaker: Rob Heltzel



3:00 to 3:45 PM ET “Does Financial Planning Fit in Your Future?”  
Speaker: Nancy Langdon Jones, MS, CFP Board Emeritus

## Welcome to the Ask the Expert

1:00 to 4:00 PM ET Adviser Answers without Appointments