

SUMMER RETIREMENT READINESS SERIES

Your Passport to Retirement

Session 6 of 10 • From Today to Tomorrow: Lifetime & Legacy Planning

 **Thursday, July 16** | Noon – 1 p.m. | Virtual via Microsoft Teams

 [Registration Link](#)

Your retirement journey starts here.

The **Summer Retirement Readiness Series: Your Passport to the Next Chapter** is a 10-part webinar series designed to guide Pitt employees through every aspect of planning for and transitioning into retirement. Each session takes a deeper dive into a specific topic, giving you the knowledge and tools you need to retire with confidence.

In Session #6, our subject matter experts will cover:

Lifetime Planning

- **Key legal documents** – durable powers of attorney, revocable trusts, living wills, and healthcare proxies to protect your wishes before incapacity
- **Gifting strategies** – options for transferring wealth to loved ones and charitable organizations during your lifetime

Planning for Death

- **Wills and trusts** – essential documents for directing how your assets are distributed and avoiding probate
- **Beneficiary designations and asset transfer** – how assets pass to heirs, the difference between probate and non-probate assets, and why keeping beneficiaries current matters
- **Estate and inheritance tax planning** – strategies to minimize taxes and a state-by-state overview of what your heirs may owe

There will also be time at the end of the session for live Q&A.

This series is open to all Pitt employees.

REGISTER NOW →

After registering, you'll receive a confirmation email with instructions on how to join the session. This session will be recorded, and slides made available following the session on the [Retirement Readiness](#) webpage.

[Download the Passport \(PDF\)](#) to keep track of your progress and take notes!

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Presented by the Office of Human Resources, Benefits Department