

## SUMMER RETIREMENT READINESS SERIES

# Your Passport to Retirement

Session 7 of 10 • Protecting What You've Built: Estate Planning & Legal Essentials

 **Wednesday, July 29** | 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 #7, our subject matter experts will cover:**

- **Wills, trusts, and powers of attorney** – the essential building blocks of a sound estate plan and how each tool protects you and your loved ones
- **Advance directives** – documenting your healthcare and financial wishes so the right people can act on your behalf
- **Probate basics and asset transfer** – how the probate process works and strategies to simplify passing assets to your heirs
- **Estate and gift tax planning** – strategies to preserve your wealth
- **Life events and digital assets** – how divorce, minor children, and online accounts should factor into your estate plan
- **Common mistakes to avoid** – pitfalls that can undermine even a well-intentioned plan

*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!

The information provided is accurate as of the date of this presentation and is intended for general guidance only. Any future modifications or updates will be communicated as they occur. Staff, Faculty, and Librarians under Collective Bargaining Agreements are governed according to the terms of those agreements.

*Presented by the Office of Human Resources, Benefits Department*