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## Alex Kaplun

### CURRICULUM VITAE

#### **1. Personal Details**

Permanent Home Address: 75 Jasmin St. Mevasseret Zion, Israel

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#### **2. Higher Education**

<b>Period</b>	<b>Name of Institution and Department</b>	<b>Degree</b>
2017-2021	University of Haifa- Gerontology Dep.	Ph. D Financial Gerontology
2014-2017	University of Haifa- Gerontology Dep.	M.A Financial Gerontology (Highest Honors)
2000-2002	The University of Manchester – Business School	M.B.A Marketing
1985-1989	Ben Gurion University- Economics & Accounting Dep.	B.A Economics & Accounting

#### **3. Offices In Academic Administration**

<b>Dates</b>	<b>Name of Institution and Department</b>	<b>Position</b>
2021 Today	University of Haifa, Faculty of Welfare and Health Sciences – Continuing Education Unit	Head of the Financial-Gerontology Program
2017-2021	The Collage of Management Academic Studies- Israel	Gerontology Studies Coordinator

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#### 4. Participation in Scholarly Conferences

##### Active Participation

##### a. International Academic Conferences:

Date	Name of Conference	Place of Conference	Subject of Lecture/Discussion	Role
18.12.2019	The Future of Gerontology-International Conference	University of Haifa Israel	The meaning of Planning One's Life after Retirement: A lifespan Perspective	Lecturer & Chairman of a discussion group
3-6.9.2017	IAREP 2017 Conference- Leveraging Behavioral Insights	College of Management Academic Studies Israel	The Meaning that People Around the Age of 50 Grant to Planning Lifetime After Retirement	Lecturer

##### b. Academic conferences:

Date	Name of Conference	Place of Conference	Subject of Lecture/Discussion	Role
12-13.09.2024	The 25 <sup>th</sup> Biennial Conference of the Israeli Gerontological Association	Tel Aviv Israel	The Gerontologist as a Profession	lecturer
13.12.2019	Management as a Profession-Academic Conference	College of Management Academic Studies Israel	Professional Relevance in the Age of Life Expectancy Extension	Keynote Speaker
11.06.2018	The Third Age – a Multidisciplinary Challenge	College of Management Academic Studies	Personal Futurism & Choosing a Profession in the Age of Longevity	lecturer

		Israel		
12-13.02.2018	The 22 <sup>nd</sup> Biennial Conference of the Israeli Gerontological Association	Tel Aviv Israel	The meaning that 50s give to retirement planning	lecturer
25.05.2016	Haifa First Conference on Economics and Longevity	University of Haifa Israel	The Meaning that People Around the Age of 50 Grant to Planning Lifetime After Retirement	lecturer
1-2.02.2016	The 21 <sup>st</sup> Biennial Conference of the Israeli Gerontological Association	Tel Aviv Israel	The Meaning that People Grant to Planning Lifetime After Retirement	Display a research poster

**c. Organization of Conferences or Sessions**

Date	Name of Conference	Place of Conference	Subject of Conference	Role
11.06.2018	The Third Age – a Multidisciplinary Challenge	College of Management Academic Studies Israel	Longevity in a Multidimensional Perspective	Initiator & Chairman of the Conference

**5. Research Grants**

Role in Research	Co-Researchers	Topic	Funded by/ Amount	Year
Co-PI	Ido Kalir, Ph.D. Nitsan Almog, Ph.D.	The role of the Caregiver in the	Israeli Prime Minister's Office	2021

	David Aharon, Ph.D.	Community and Institutions	The Joint & Ministry of Health of Israel	
Co-PI	Prof. Israel Doron Ido Kalir, Ph.D.	Default Pension Funds: Will they keep their promise?	Menorah Mivtachim USD 29,000	- 2019 2017

## 6. Scholarships

Funded by	Target	Topic	Amount	Year
University of Haifa	Ph.D.	M A with Highest Honors	University of Haifa 38,000 USD	-2017 2020

## 7. Teaching

Year	Name of Course	Role	Degree
2022 Today	Introduction to Gerontology	Initiator & lecturer	Continuing Education Unit
2024 Today	Issues in Financial-Gerontological Planning	Lecture	MA
2022 Today	Financial Innovation Seminar	Initiator & lecturer	BA
2020 Today	Venture Capital Fundraising for Start Ups	Lecture	MBA
2020 2023	Venture Capital Fundraisin & Crowdfunding	Lecture	BA
2017 2021	Psychology of Ageing and Retirement	Lecture	MBA

2017-2021	Economic Aspects of Longevity	Lecture	MBA
2017-2019	Issues in law and Ageing	Lecture	MBA
2015 Today	Long-Term Saving & Financial Planning	Lecture	BA

#### 8. Guest lecturer

Year	Name of Institution	Type	Topic
2019	Ben Gurion University	Lecture	Entrepreneurship & Age Tech
2019	Kibbutzim College	Lecture	Economic Topics of Longevity
2017	University of Haifa	Lecture	Long-Term Saving & Life Planning

#### 9. Professional Experience

Period	Name of Institution/ Company	Last / Senior Office
2024 Today	Aroya Technologies Ltd	Member of the Board of Advisors
2022 Today	A.G Consulting	Co- Founder
2017- 2022	FUTURING UP Technologies Ltd.	Co- Founder & CEO
2013-2016	Ayalon Pension	V P
2008-2013	Clal Agencies Holding Ltd.	Chairman of the Board
2008-2013	Atudot Pension Fund	Member of the Bord of Directors

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2004-2013	Clal Insurance & Pension Group	Senior V P
2002-2003	Gal Underwriters Insurance Agency Ltd.	CEO
1991-2002	Migdal Insurance Group	V P

### **9. Positions and Activities**

Israel Gerontology Society- Member of the Board of Directors, 2021-Today

Israel Gerontology Society- Member, 2016- Today

Union of Financial Planners, CFP- Member, 2016-2023

### **PUBLICATIONS**

#### **M.A. Thesis**

The meaning that people around the age of 50 grant to planning lifetime after retirement, University of Haifa, Israel, Supervised by Prof. Tova Band Wintershtein & Prof. Israel Doron. *Gerontology and Geriatrics* 48 (1-2), 149-173.

#### **Ph.D. Dissertation**

The meaning of planning one's life after retirement age- A lifespan perspective, University of Haifa, Supervised by Prof. Tova Band Wintershtein & Prof. Israel Doron.

#### **Articles in Refereed Journals**

##### **Published**

**Kaplun, A.,** Band Wintershtein, T., & Doron, I. (2019). The meaning given to planning one's life after retirement by people over the age of 50. *Gerontology and Geriatrics* 48 (1-2), 149-173. [Hebrew]