2024 Financial Wellness Workshops

Join us for live financial wellness workshops hosted by our financial experts. Each quarter’s 60-minute workshop is comprised of three 20-minute sessions on different topics. Each themed workshop is offered three times throughout the quarter. Click below to register for the day that works for you.

Q1: Healthy Habits

- Automating Healthy Financial Habits
  Save more for emergencies, retirement, and other financial goals

- Debt Management & Prioritizing Your Savings
  What comes first: retirement savings, emergency savings or paying off debt?

- Credit: Understand it, Build it, Secure it
  Protect your assets

Q2: Investment Insights

- Target-Date Funds
  Do it myself or do it for me? A deep dive into understanding TDFs and all the investment options in your retirement plan

- The Power of 1%
  Small changes make a big impact in retirement

- Inflation and Interest Rates
  Maximizing your money: navigating major purchases, financial planning and market fluctuations

Q3: Retirement Readiness

- Taxes in Retirement
  Strategies for drawing down assets in retirement

- Healthcare in Retirement
  Medicare options and long-term care

- Your Financial Legacy
  Preparing for the unexpected: Trusts, wills & estate planning

Q4: Financial Fitness

- College Savings 529 Plans
  Understanding the tax and other benefits

- HSAs and FSAs
  Tax-advantaged savings for your healthcare needs

- Roth vs. Traditional 401(k)/403(b)
  What’s similar, what’s different, what’s right for you?