2024 Financial Wellness Educational Series

If you are unable to attend the live sessions, click here to browse Fidelity's full catalog of on-demand webinars. *Suggested topics are listed below.*

Q1 Managing Your Money	Webinar	Description	Date	Suggested On-Demand Webinars
Register Here	Get Started and Save for Future You	Discussing our 401(k) savings plan and the power of investing	**January 12, 2024** 2:00 pm ET / 11:00 am PT	Get Started and Save for the Future You (available in Spanish) ON DEMAND • Understand your retirement plan • Learn the steps to enroll in your plan • See if you're saving enough • Learn ways to save more
Register Here	Create a Budget and Build Emergency Savings	Learn about the components of a budget using Fidelity's 50-15-5 guideline and see how emergency savings is a critical part of your budget	**January 23, 2024** 2:00 pm ET / 11:00 am PT	Create a Budget ON DEMAND • Recognize how creating a budget can help you take control of your financial situation • Identify the three core components of a sound budget, using the 50-15-5 saving and spending guideline • Create your own budget Managing My Money (available in Spanish) ON DEMAND • Identify the three core components of a sound budget • Begin to build (or rebuild) your emergency savings fund • Get control over prioritizing your debt
Register Here	Tackle Debt and Understand Your Credit Score	Discuss different methods to pay down debt and learn to better understand credit scores	**January 31, 2024** 2:00 pm ET / 11:00 am PT	Take Control of Your Debt ON DEMAND • Identify guidelines when it comes to taking on debt • Use one of two strategies for tackling debt • Understand your credit score and why it's so important Get a Handle on Your Current Student Loan Debt ON DEMAND • Understand a wide range of student loan repayment options • Use Fidelity's student debt resources and tools to evaluate your current loan situation and determine next steps for tackling your student debt

Managing your money – Extra credit	Fidelity Viewpoints: Raising Money-Smart Kids	It's never too early to start teaching - and learning - about money.		
Q2 Foundation Building				
	Five Money Musts	Understand what a budget is and why you need one Know how to use credit and manage debt Recognize how investing can help you reach your money goals Start thinking about retirement	April 17, 2024	**Five Money Musts** **ON DEMAND** • Understand what a budget is and why you need one • Know how to use credit and manage debt • Recognize how investing can help you reach your money goals • Start thinking about retirement
	Buying a Home	Home ownership can be rewarding but there are several factors to consider, some which may not be obvious to the first time (or even seasoned!) buyer	April 24, 2024	**Fidelity Viewpoints: Your Home - Make the Right Money Moves** **ON DEMAND** • Learn how the choices you make about where you live can have big impacts on your finances - at every phase of your life.
	Life Events: College Planning - Navigating the Road to Admissions	College planning, for parents and child, is about more than saving money. We can help on key steps from saving, preparing, applying and choosing	May 1, 2024	**Your College Savings Options** **ON DEMAND** • Learn how to start saving for a child's college education
	Caring for an Aging Loved One	Aging is a part of life. We will discuss how to prepare a plan with and for your loved one, navigate common concerns, and prioritize your own self-care in the process	May 8, 2024	**Planning for caregiving** **ON DEMAND** • What it means to leave work to care for loved ones and how to reduce the financial impact.
Savvy Investor				
	Quarterly Market Update☐	Review current macro- and microeconomic conditions Explore U.S. equity, international equity, and fixed income markets Consider long-term investing themes	August 7, 2024	**Fidelity Viewpoints: Market Sense** **ON DEMAND** • Every week, in about 20 minutes, we cover the latest market happenings, actions you might consider, and answers to common questions. (Also available on NetBenefits.)
	Navigating Market Volatility	Learn about the importance of having a plan and staying the course, investing best practices, and common pitfalls to avoid during volatile markets. The goal is for you	August 14, 2024	**Navigating Market Volatility*** **ON DEMAND** • Consider if you should change your investments • Understand how to pull money out of the market and the

		to establish a plan if you don't have one, feel comfortable with your plan, and know where to get help.		effects of moving to cash • Learn why to consider saving more in a workplace savings plan
	Saving and Investing Beyond Your Retirement Plan	Saving for retirement, but need help with your short-term financial goals? Learn the basics of investing, and the different types of accounts, so you can optimize your savings to help you reach your goals	August 21, 2024	**Invest Confidently for Your Future** **ON DEMAND** • Define your savings goals • Build an investment plan to help you optimize your savings • Understand the importance of continuously managing your plan
	Estate Plans Can Help Protect What Matters Most	If you haven't created an estate plan yet, you'll be surprised how many topics it covers. Learn five steps to consider when preparing to meet with your estate planning professional	August 28, 2024	**Preserving Your Savings for Future Generations** **ON DEMAND** • Understand what assets are potentially taxable and how they might be distributed • Learn the importance of a living will and health care proxy • Review the basics of trusts, gifting, and possible insurance replacement strategies
Pre-Retiree				
	Top Things to Do Before You Retire	Wish you had a to do list to help you prepare for retirement? Learn how to get your financial house in order and other important considerations that can impact your decisions	October 2, 2024	
	Understanding the Basics of Social Security	Social Security may be an important income source for retirement. Learn about key Social Security claiming ages and how your benefit is calculated, so you can better understand the choices	October 9, 2024	**Learn the Basics of When and How to Claim Social Security*** **ON DEMAND** • Understand Social Security • Considerations for claiming Social Security benefits • Decide when to take Social Security benefits
	Planning for Health Care Costs and Coverage in Retirement	Health care costs in retirement can affect your savings and lifestyle. Explore how to prepare for the reality of health care costs in retirement	October 16, 2024	**Prepare for the Reality of Health Care in Retirement** **ON DEMAND** • Estimate retirement health care costs • Understand available options before and after age 65 • Plan for retirement health care costs
	How to Plan for the Income You'll Need in Retirement	How do your financial resources turn into income in retirement? It starts with a plan. Learn how to create a retirement income plan and explore the risks that can impact it.	October 23, 2024	**Fundamentals of Retirement Income Planning** **ON DEMAND** • Learn the benefits of a retirement income plan • Identify retirement income sources and expenses

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