



## Financial Wellbeing Resources Upcoming Webinars

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### January

#### Managing Your Lifestyle

Managing Your Lifestyle

Thursday, January 16, 2025, 1:00pm ET  
[Click link to register.](#)

Join the webinar this month to take a look at how smart strategies can enhance your lifestyle while at the same time potentially freeing up assets to invest for the long term. Managing your lifestyle is all about making smart choices. Each lifestyle decision you make, from your choice of a home, to what you drive, to how you spend your leisure time, has an impact on your overall financial situation.

### February

#### Will You Have Enough Income in Retirement?

Retirement Planning

Thursday, February 20, 2025, 1:00pm ET  
[Click link to register.](#)

Join this month's webinar to learn how to plan for when your retirement will start, how to supplement fixed income sources such as Social Security and an employer pension with your retirement savings, and the steps to determine the income you'll need to help meet your goals, factoring in health-care costs, taxes, and inflation

### March

#### Taking Charge of Your Financial Future

Women and Money

Thursday, March 20, 2025, 1:00pm ET  
[Click link to register.](#)

In this month's webinar, we'll look at six steps women can take to help them pursue financial security, including taking control of their money, becoming more knowledgeable investors, advocating for themselves in the workplace, planning for retirement, protecting their income and assets, and creating an estate plan

### April

#### Are You Saving Enough for Your Child's College Education?

College Planning

Thursday, April 17, 2025, 1:00pm ET  
[Click link to register.](#)

Our webinar covers the role of financial aid, including how need is determined and how assets are classified for federal aid purposes, and other ways to fill the college funding gap. We'll also discuss how much college will cost in the future and share some tax-advantaged ways to save for your education.

### May

#### Taking Charge of Your Financial Future

Women and Money

Thursday, May 15, 2025, 1:00pm ET  
[Click link to register.](#)

In this month's webinar, we'll discuss how emotions can influence your investment decisions, general market expectations for three types of investors, and lessons from the last 9 decades of US economic history.

### June

#### LGBTQ+ Community is a Powerful Financial Force.

Growing LGBTQ Wealth

Thursday, June 26, 2025, 1:00pm ET  
[Click link to register.](#)

In our next webinar, we'll aim to give you the tools and knowledge to feel empowered to take action against money stress. We'll introduce you to some data and trends about the LGBTQ community, and look at some of the unique challenges you face. Let's help you identify your relationship with money today, and leave you with actionable items for success.



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### July

#### Will Your Retirement Savings Be There for You?

Intro to Annuities

Join the webinar and learn what an annuity is and how it can provide you with supplemental retirement income beyond traditional retirement sources such as IRAs and 401(k)s, and the different types of payout options and factors affecting payouts.

Thursday, July 17, 2025, 1:00pm ET  
[Click link to register.](#)

### August

#### Have You Created an Estate Plan for Your Family?

Estate Planning

Join the webinar on Estate Planning Basics, to learn why you need an estate plan; all about wills, trusts, and life insurance; and key tax basics, including an overview of the federal gift tax, estate tax, and generation-skipping transfer tax.

Thursday, August 21, 2025, 1:00pm ET  
[Click link to register.](#)

### September

#### Mastering the First-Time Homebuying Journey

Homebuying

In this webinar, we'll discuss the professionals guiding your homebuying journey and why understanding their roles is crucial, and why having a sound financial plan that prioritizes savings, debt, and lifestyle can make home ownership achievable in a challenging market.

Thursday, September 18, 2025, 1:00pm ET  
[Click link to register.](#)

### October

#### 30 Minutes to Savvy Cybersecurity

Cybersecurity

Join this one-hour webinar to learn how to start building a customized cybersecurity action plan that will stop the hackers, identity thieves, and spammers. Cybersecurity is a growing threat, but you don't have to be hopeless. There are actions you can take today that will block the cybercrooks from wreaking havoc on your identity and your finances.

Thursday, October 16, 2025, 1:00pm ET  
[Click link to register.](#)

### November

#### Social Security: When Should You Start Receiving Retirement Benefits?

Social Security

Join this month's webinar to learn what your full retirement age is, how your benefit is determined, and how retiring earlier than, or later than, your full retirement age will affect your Social Security benefit. As you near retirement, one of the biggest financial decisions you'll need to make is when to begin receiving your Social Security retirement benefits. It's important to take the time to explore your options and make an informed, well-reasoned decision.

Thursday, November 20, 2025, 1:00pm ET  
[Click link to register.](#)

### December

#### Understanding and Improving Your Credit

Improving Your Credit

Join this webinar to learn the basics of credit and some common credit score misconceptions. We'll also show you how to access and read your credit report and give practical tips to increase (and maintain) your credit score. Start your journey towards a better credit score and overall financial well-being?

Thursday, December 18, 2025, 1:00pm ET  
[Click link to register.](#)