Financial Wellness Program

EDUCATIONAL WORKSHOPS

Advisor-delivered financial workshops are an integral component of the comprehensive Financial Wellness Program. The scope of topics provide educational information on a wide range of areas, from Establishing Retirement Needs to Saving for College Education and more.

A curriculum specific for each organization can be developed so it is tailored to the needs or interests of that group.

Workshop Curriculum

Retirement Planning	College Savings	Personal Finance
Establishing Your Retirement Needs	Saving for Your Child's College Education	Financial Planning for Retirement
Preparing for the Golden Years		Income Tax Planning
Benefits of Your 403(b) Plan	**Insurance & Protection**	Debt Management
Benefits of Your 457(b) Plan	The Value of Life Insurance	Fundamentals of Investing
Could a Roth 403(b) Help You?	The Value of Long Term Care Insurance	Mutual Fund Basics
Understanding Individual Retirement Accounts (IRA)		Staying the Course in Difficult Times
	Social Security	
	Social Security: When to Start Benefits	

Workshops include:

Retirement Planning

- ☐ Establishing Your Retirement Needs
- ☐ Preparing for the Golden Years
- ☐ Benefits of Your 403(b) Plan
- ☐ Benefits of Your 457(b) Plan
- ☐ Understanding Individual Retirement Accounts (IRA)
- ☐ Could a Roth 403(b) Help You?

Saving for College

- ☐ Saving for Your Child's College Education

Insurance & Protection

- ☐ The Value of Life Insurance
- ☐ The Value of Long Term Care Insurance

Personal Finances

- ☐ Financial Planning for Retirement
- ☐ Income Tax Planning
- ☐ Debt Management
- ☐ Fundamentals of Investing
- ☐ Staying the Course in Difficult Times
- ☐ Mutual Fund Basics

Social Security & Medicare

- ☐ Social Security: When to Start Benefits