2020 WEBINAR SCHEDULE

Scheduled Webinars – 1:00 to 2:00 p.m. ET

January 23  Is Your Financial House in Order? covers concepts such as budgeting, debt management, protection of assets, preparing for retirement, and creating a legacy for your loved ones.

February 18  Taking Control of Your Taxes focuses on how investment decisions in today’s tax environment can impact your income in retirement.

March 19  It’s Your Estate, Are You in Control? discusses fundamentals of estate planning from taxes to asset distribution.

April 14  Budgeting and Debt Management focuses on budgeting, how to prioritize your bills, and the importance of saving and investing.

May 21  Roadmap to Retirement discusses actions you should consider at particular ages to ensure you get the most out of your retirement.

June 2  Student Loans — How to Pay Off Your Debt discusses the impact student loan debt has on borrowers and provides repayment options and payoff strategies.

June 18  Teaching Your Children Good Money Habits looks at some age-by-age questions and lessons to help you reinforce your family’s values about spending, giving, and saving.

July 7  The Basics of Saving & Investing covers the importance of paying yourself first, how interest is calculated, types of investments, and more.

July 23  Healthcare in Retirement examines topics including what Medicare covers, out-of-pocket expenses, long-term care, and supplemental insurance.

August 18  Taking Control of Your Taxes focuses on how investment decisions in today’s tax environment can impact your income in retirement.

September 3, 10, 17, 24  The Basics of Saving & Investing covers the importance of paying yourself first, how interest is calculated, types of investments, and more.


November 19  Financial Challenges of the Sandwich Generation discusses issues faced by those caring for children and parents at the same time.

December 15  Steps to Buying and Selling a Home review the important decisions that are part of buying or selling your home.

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