

Fidelity Workshops

Help and support for all your employees

At Fidelity, we understand that today's diverse workforce has a wide range of needs and that financial wellness is unique to every individual. That's why we developed a series of educational programs to help you help your employees get the most out of their benefits and meet their goals.



ONSITE LIVE



ON DEMAND



VIRTUAL LIVE

Jugglers are anxious about their financial situation and are prioritizing expenses to make ends meet.

They desire **financial stability** and want to feel hopeful that they can improve their financial situation.



Top Financial Priorities

SHORT TERM

Pay current bills

Start to save for emergencies

Pay down debt

LONG TERM

Save for retirement (be able to retire)

Save for a big purchase (home)

CHALLENGES/FOCUS

Rebound from financial setback

Build financial literacy skills

An Easy Way to Save More: The Benefits of Your Employee Stock Purchase Plan (ESPP)¹

- Understand how ESPPs work
- Learn how your ESPP and Fidelity Account® interact and planning tools that are available to you

Discover the Potential of Your HSA²

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Recognize the features of the HSA
- Explore the potential benefits of an HSA
- Learn the importance of a safety net

Exploring the Benefits of an HSA²

ONSITE LIVE VIRTUAL LIVE

- Understand the benefits of an HDHP/HSA
- See how they work together
- Explore the features of the HSA

Five Money Musts

ON DEMAND VIRTUAL LIVE

- 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

Fidelity Personalized Planning & Advice³

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Learn to manage your own portfolio
- Explore Fidelity's professional investment management
- Understand the benefits, fees, and expenses

Fundamentals of Retirement Income Planning

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Learn the benefits of a retirement income plan
- Identify retirement income sources and expenses
- Explore different retirement income strategies

Get a Handle on Your Current Student Loan Debt

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- 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

Get Started and Save for the Future You*

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Understand your retirement plan
- Learn the steps to enroll in your plan
- See if you're saving enough
- Learn ways to save more

Guiding You through Your Equity Plan¹

- Learn about your company's stock plan(s)
- Consider key action steps to ensure that your plan is set up for success
- Understand how to work with Fidelity

Identify and Prioritize Your Savings Goals*

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Learn how to save for each goal
- Get next steps for saving

Learn the Basics of When and How to Claim Social Security*

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Understand Social Security
- Considerations for claiming Social Security benefits
- Decide when to take Social Security benefits

Make the Most of Your Retirement Savings*

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- See the importance of saving as much as possible
- Learn the benefits of saving more
- Identify different retirement account types
- Explore ways to preserve and grow savings

Manage Unexpected Events and Expenses

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Know how to assess spending and take control of a budget
- Consider reasons for taking money from a workplace savings plan
- Understand ways Fidelity can help

Managing My Money*

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Identify the three core components of a sound budget
- Begin to build (or rebuild) your emergency savings fund
- Get control over prioritizing your debt

Navigating Market Volatility*

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Learn the history of market conditions
- Understand the importance of having a plan
- Recognize the pitfalls potentially faced by investors

Organize, Plan, and Own Your Future

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Explore what financial wellness means for women
- Learn the principles of budgeting and saving
- Discover how to design an investing plan to meet specific goals
- See how defining an investing personality can help keep you on track

Prepare for the Reality of Health Care in Retirement

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Estimate retirement health care costs
- Understand available options before and after age 65
- Plan for retirement health care costs

Retirement Income Planning for Her

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Understand why retirement planning is different for women
- Identify the five key financial risks in retirement
- Learn the basics of creating a retirement income plan

*Available in Spanish

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ON DEMAND



VIRTUAL LIVE

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They desire **financial stability** and want to feel hopeful that they can improve their financial situation.



Top Financial Priorities

SHORT TERM

Pay current bills

Start to save for emergencies

Pay down debt

LONG TERM

Save for retirement (be able to retire)

Save for a big purchase (home)

CHALLENGES/FOCUS

Rebound from financial setback

Build financial literacy skills

Understanding Your Nonqualified Deferred Compensation (NQDC) Plan(s)

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Event based topic
- Understand the potential benefits of your nonqualified deferred compensation plan
- Learn the factors you should consider before participating in the plan

Your College Savings Options

ON DEMAND VIRTUAL LIVE

- Learn how to start saving for a child's college education

Create a Budget and Build Emergency Savings

VIRTUAL LIVE - 30 minutes

- Learn about different components of a budget
- Use Fidelity's 50-15-5 saving and spending guideline
- See how emergency savings are a critical part of your budget

Retirement Basics

VIRTUAL LIVE - 30 minutes

- Learn how important it is to save for the future
- See the power of saving small amounts over time
- Learn about other vehicles such as IRAs, HSAs, and brokerage accounts

Tackle Debt and Understand Your Credit Score

VIRTUAL LIVE - 30 minutes

- Discover different strategies for paying down debt
- Learn how to better understand credit scores
- Take better control of finances

Understanding Roth Contributions in Your Workplace Savings Plan*

VIRTUAL LIVE - 30 minutes

- Learn about different tax-advantaged ways you can contribute to your workplace savings plan
- Understand how those contribution types can affect your paycheck and your taxes
- Know the difference between a Roth IRA and the Roth option in your workplace savings plan

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

Build an Emergency Savings Fund

ON DEMAND

- Identify how much you should save
- Find the money to contribute to this fund
- Set up your own emergency saving fund

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

Understand Plan Loans

ON DEMAND

- Understand if a plan loan or withdrawal is right for you
- Recognize the importance of an emergency savings account
- Know how to keep retirement goals on track

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ONSITE LIVE



ON DEMAND



VIRTUAL LIVE

Safeguarders

are cautiously managing their finances and seeking safe ways to save more.

They desire **financial certainty** and want to feel reassured that they're not being 'risky' with their money.



Top Financial Priorities

SHORT TERM

Pay off student loans

Start saving (save more) for retirement

Pay off debt

LONG TERM

Plan for retirement (retire debt free)

Save for a big purchase (home)

CHALLENGES/FOCUS

Prioritize competing obligations

Save enough to retire comfortably

An Easy Way to Save More: The Benefits of Your Employee Stock Purchase Plan (ESPP)¹

- Understand how ESPPs work
- Learn how your ESPP and Fidelity Account® interact and planning tools that are available to you

Discover the Potential of Your HSA²

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Recognize the features of the HSA
- Explore the potential benefits of an HSA
- Learn the importance of a safety net

Exploring the Benefits of an HSA²

ONSITE LIVE VIRTUAL LIVE

- Understand the benefits of an HDHP/HSA
- See how they work together
- Explore the features of the HSA

Fidelity Personalized Planning & Advice³

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Learn to manage your own portfolio
- Explore Fidelity's professional investment management
- Understand the benefits, fees, and expenses

Fundamentals of Retirement Income Planning

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Learn the benefits of a retirement income plan
- Identify retirement income sources and expenses
- Explore different retirement income strategies

Get a Handle on Your Current Student Loan Debt

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- 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

Get Started and Save for the Future You*

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Understand your retirement plan
- Learn the steps to enroll in your plan
- See if you're saving enough
- Learn ways to save more

Guiding You through Your Equity Plan¹

- Learn about your company's stock plan(s)
- Consider key action steps to ensure that your plan is set up for success
- Understand how to work with Fidelity

Learn the Basics of When and How to Claim Social Security*

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Understand Social Security
- Considerations for claiming Social Security benefits
- Decide when to take Social Security benefits

Make the Most of Your Retirement Savings*

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- See the importance of saving as much as possible
- Learn the benefits of saving more
- Identify different retirement account types
- Explore ways to preserve and grow savings

Maximize Social Security in Your Retirement Strategy

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Learn how Social Security fits your retirement paycheck
- Identify Social Security claiming strategies
- Create your retirement income plan

Navigating Market Volatility*

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Learn the history of market conditions
- Understand the importance of having a plan
- Recognize the pitfalls potentially faced by investors

Organize, Plan, and Own Your Future

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Explore what financial wellness means for women
- Learn the principles of budgeting and saving
- Discover how to design an investing plan to meet specific goals
- See how defining an investing personality can help keep you on track

Prepare for the Reality of Health Care in Retirement

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Estimate retirement health care costs
- Understand available options before and after age 65
- Plan for retirement health care costs

Preserving Your Savings for Future Generations⁴

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- 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

Retirement Income Planning for Her

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Understand why retirement planning is different for women
- Identify the five key financial risks in retirement
- Learn the basics of creating a retirement income plan

Your College Savings Options

ON DEMAND VIRTUAL LIVE

- Learn how to start saving for a child's college education

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ONSITE LIVE



ON DEMAND



VIRTUAL LIVE

Safeguarders

are cautiously managing their finances and seeking safe ways to save more.

They desire **financial certainty** and want to feel reassured that they're not being 'risky' with their money.



Top Financial Priorities

SHORT TERM

Pay off student loans

Start saving (save more) for retirement

Pay off debt

LONG TERM

Plan for retirement (retire debt free)

Save for a big purchase (home)

CHALLENGES/FOCUS

Prioritize competing obligations

Save enough to retire comfortably

Investing for Beginners

VIRTUAL LIVE - 30 minutes

- Understand basic investing terms and concepts
- Learn about the building blocks of investing
- Determine what type of investor to be

Retirement Basics

VIRTUAL LIVE - 30 minutes

- Learn how important it is to save for the future
- See the power of saving small amounts over time
- Learn about other vehicles such as IRAs, HSAs, and brokerage accounts

Understanding Roth Contributions in Your Workplace Savings Plan*

VIRTUAL LIVE - 30 minutes

- Learn about different tax-advantaged ways you can contribute to your workplace savings plan
- Understand how those contribution types can affect your paycheck and your taxes
- Know the difference between a Roth IRA and the Roth option in your workplace savings plan

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ONSITE LIVE



ON DEMAND



VIRTUAL LIVE

Aspirers are motivated to do better and are actively exploring ways to achieve their financial goals.

They desire **financial freedom** and want to know for sure that they're making progress toward their financial goals



Top Financial Priorities

SHORT TERM

Pay off debt

Save for college costs

Start investing/build wealth

LONG TERM

Save for a big purchase (home)

Retire comfortably

CHALLENGES/FOCUS

Build investing knowledge

Save for multiple goals

An Easy Way to Save More: The Benefits of Your Employee Stock Purchase Plan (ESPP)¹

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- Learn how your ESPP and Fidelity Account® interact and planning tools that are available to you

Discover the Potential of Your HSA²

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Exploring the Benefits of an HSA²

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- Understand the benefits of an HDHP/HSA
- See how they work together
- Explore the features of the HSA

Five Money Musts

ON DEMAND VIRTUAL LIVE

- Understand what a budget is and why you need one
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- Recognize how investing can help you reach your money goals
- Start thinking about retirement

Fidelity Personalized Planning & Advice³

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Learn to manage your own portfolio
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Fundamentals of Retirement Income Planning

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Learn the benefits of a retirement income plan
- Identify retirement income sources and expenses
- Explore different retirement income strategies

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Get a Handle on Your Current Student Loan Debt

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- 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

Get Started and Save for the Future You*

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Understand your retirement plan
- Learn the steps to enroll in your plan
- See if you're saving enough
- Learn ways to save more

Guiding You Through Your Equity Plan¹

- Learn about your company's stock plan(s)
- Consider key action steps to ensure that your plan is set up for success
- Understand how to work with Fidelity

Identify and Prioritize Your Savings Goals*

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Learn how to save for each goal
- Get next steps for saving

Invest Confidently in Your Future

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Define your savings goals
- Build an investment plan to help you optimize your savings
- Understand the importance of continuously managing your plan

Learn the Basics of When and How to Claim Social Security*

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Understand Social Security
- Considerations for claiming Social Security benefits
- Decide when to take Social Security benefits

Make the Most of Your Retirement Savings*

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- See the importance of saving as much as possible
- Learn the benefits of saving more
- Identify different retirement account types
- Explore ways to preserve and grow savings

Making the Most of Your Stock Plan⁴

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Understand the role of equity compensation in planning for multiple goals
- Apply sound investing principles

Manage Unexpected Events and Expenses

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Know how to assess spending and take control of a budget
- Consider reasons for taking money from a workplace savings plan
- Understand ways Fidelity can help

Maximize Social Security in Your Retirement Strategy

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Learn how Social Security fits your retirement paycheck
- Identify Social Security claiming strategies
- Create your retirement income plan

Navigating Market Volatility*

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Learn the history of market conditions
- Understand the importance of having a plan
- Recognize the pitfalls potentially faced by investors

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VIRTUAL LIVE

Aspirers are motivated to do better and are actively exploring ways to achieve their financial goals.

They desire **financial freedom** and want to know for sure that they're making progress toward their financial goals



Top Financial Priorities

SHORT TERM

Pay off debt

Save for college costs

Start investing/build wealth

LONG TERM

Save for a big purchase (home)

Retire comfortably

CHALLENGES/FOCUS

Build investing knowledge

Save for multiple goals

Organize, Plan, and Own Your Future

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Explore what financial wellness means for women
- Learn the principles of budgeting and saving
- Discover how to design an investing plan to meet specific goals
- See how defining an investing personality can help keep you on track

Prepare for the Reality of Health Care in Retirement

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Estimate retirement health care costs
- Understand available options before and after age 65
- Plan for retirement health care costs

Preserving Your Savings for Future Generations¹

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- 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

Retirement Income Planning for Her

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Understand why retirement planning is different for women
- Identify the five key financial risks in retirement
- Learn the basics of creating a retirement income plan

Take the First Step to Investing*

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Review the basics of investing
- Understand asset allocation and diversification
- Identify your ideal investment approach

Understand Plan Loans

ON DEMAND

- Understand if a plan loan or withdrawal is right for you
- Recognize the importance of an emergency savings account
- Know how to keep retirement goals on track

Understanding Your Nonqualified Deferred Compensation (NQDC) Plan(s)

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Event based topic
- Understand the potential benefits of your nonqualified deferred compensation plan
- Learn the factors you should consider before participating in the plan

Understanding Your Stock Plan Taxes^{1,2}

- Learn about tax filing considerations specific to stock plans and your plan type
- Understand tax forms you will need and where to find them
- Learn about the resources to help guide you during tax season

Your College Savings Options

ON DEMAND VIRTUAL LIVE

- Learn how to start saving for a child's college education

Quarterly Market Update³

VIRTUAL LIVE

- Review current macro- and microeconomic conditions
- Explore U.S. equity, international equity, and fixed income markets
- Consider long-term investing themes

Retirement Basics

VIRTUAL LIVE - 30 minutes

- Learn how important it is to save for the future
- See the power of saving small amounts over time
- Learn about other vehicles such as IRAs, HSAs, and brokerage accounts

Tackle Debt and Understand Your Credit Score

VIRTUAL LIVE - 30 minutes

- Discover different strategies for paying down debt
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Understanding Roth Contributions in Your Workplace Savings Plan¹

VIRTUAL LIVE - 30 minutes

- Learn about different tax-advantaged ways you can contribute to your workplace savings plan
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VIRTUAL LIVE

Collaborators

are free of short-term financial worries and most value partnering with financial professionals to secure their future.

They desire **financial security** and want to feel confident in the financial decisions they're making for their future.



Top Financial Priorities

SHORT TERM

Maximize investments

Protection against inflation

LONG TERM

Plan for retirement (retire comfortably)

Preserve money for future generation

CHALLENGES/FOCUS

Live comfortably (the good life)

Maintain lifestyle and health

An Easy Way to Save More: The Benefits of Your Employee Stock Purchase Plan (ESPP)¹

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- Understand tax forms you will need and where to find them
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Quarterly Market Update⁴

VIRTUAL LIVE

- Review current macro- and microeconomic conditions
- Explore U.S. equity, international equity, and fixed income markets
- Consider long-term investing themes

Understanding Roth Contributions in Your Workplace Savings Plan³

VIRTUAL LIVE - 30 minutes

- Learn about different tax-advantaged ways you can contribute to your workplace savings plan
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ONSITE LIVE



ON DEMAND



VIRTUAL LIVE

DIYers

are Confidently leading their financial strategies and proudly doing it themselves.

They desire **financial independence** and want to feel empowered to lead/make their own decisions about their money.



Top Financial Priorities

SHORT TERM

Build wealth

Save for retirement

LONG TERM

Retire comfortably

Preserve money for future generation

CHALLENGES/FOCUS

Navigate complex financial topics (estate and retirement planning)

Stay happy and healthy

An Easy Way to Save More: The Benefits of Your Employee Stock Purchase Plan (ESPP)¹

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Making the Most of Your Stock Plan²

- Understand the role of equity compensation in planning for multiple goals
- Apply sound investing principles

Maximize Social Security in Your Retirement Strategy

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- Learn how Social Security fits your retirement paycheck
- Identify Social Security claiming strategies
- Create your retirement income plan

Prepare for the Reality of Health Care in Retirement

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Estimate retirement health care costs
- Understand available options before and after age 65
- Plan for retirement health care costs

Preserving Your Savings for Future Generations³

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- 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

Retirement Income Planning for Her

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Understand why retirement planning is different for women
- Identify the five key financial risks in retirement
- Learn the basics of creating a retirement income plan

Understanding Your Nonqualified Deferred Compensation (NQDC) Plan(s)

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Event based topic
- Understand the potential benefits of your nonqualified deferred compensation plan
- Learn the factors you should consider before participating in the plan

Understanding Your Stock Plan Taxes^{2,3}

- Learn about tax filing considerations specific to stock plans and your plan type
- Understand tax forms you will need and where to find them
- Learn about the resources to help guide you during tax season

Quarterly Market Update⁴

VIRTUAL LIVE

- Review current macro- and microeconomic conditions
- Explore U.S. equity, international equity, and fixed income markets
- Consider long-term investing themes

Understanding Roth Contributions in Your Workplace Savings Plan³

VIRTUAL LIVE - 30 minutes

- Learn about different tax-advantaged ways you can contribute to your workplace savings plan
- Understand how those contribution types can affect your paycheck and your taxes
- Know the difference between a Roth IRA and the Roth option in your workplace savings plan

¹Available for participants in the U.S. and outside the U.S. Workshop only available for stock plans administered by Fidelity. For more information, or to request a presentation on this topic, please reach out your SPS Communications contact. Fidelity Stock Plan Services, LLC, provides recordkeeping and/or administrative services to your company's equity compensation plan, in addition to any services provided directly to the plan by your company or its service providers.

²Available for participants in the U.S. Workshop only available for stock plans administered by Fidelity. For more information, or to request a presentation on this topic, please reach out your SPS Communications contact. Fidelity Stock Plan Services, LLC, provides recordkeeping and/or administrative services to your company's equity compensation plan, in addition to any services provided directly to the plan by your company or its service providers.

³Fidelity does not provide legal or tax advice. The information herein is general in nature and should not be considered legal or tax advice. Consult an attorney or tax professional regarding your specific situation.

⁴Not available during the first month of each quarter.

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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.)

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Learn how the choices you make about where you live can have big impacts on your finances - at every phase of your life.

[Fidelity Viewpoints: Raising Money-Smart Kids](#)

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It's never too early to start teaching - and learning - about money.

[Financial Do's and Don'ts of Divorce](#)

ON DEMAND

Valuable information to help you face divorce head on.

[Fidelity Viewpoints: Make Informed Health Plan Choices](#)

ON DEMAND

Selecting the coverage you need, considering payment options, and investing the money you've set aside for health expenses.

[Fidelity Viewpoints®: Maximizing Benefits During a Job Transition:](#)

ON DEMAND

How job changes can affect your finances, retirement plans, and healthcare coverage.

PREPARING FOR RETIREMENT

[Making a Plan for Retirement Income](#)

ON DEMAND

Understand the pieces of a retirement income plan (including protecting your savings) in order to transition from saving for retirement to living in retirement.

[Fidelity Viewpoints: Making Sense of Medicare](#)

ON DEMAND

How and when to enroll, Medigap and Medicare Advantage plans, and Parts A, B & D.

[Are You Emotionally Ready to Retire?](#)

ON DEMAND

Prepare yourself mentally for the day retirement arrives.

[Fidelity Viewpoints®: Building Your Bridge to Medicare](#)

ON DEMAND

Here's what you need to know if you find yourself without health insurance before you turn 65.

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Selecting the coverage you need, considering payment options, and investing the money you've set aside for health expenses.

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On demand videos and live discussions that address gender differences in financial planning, discuss today's hot financial topics, and answer top money questions.

SAVING & INVESTING

[The financial realities of being a woman](#)

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Learn about the contributing factors of why women need to save more for retirement.

[Investing \(beyond your retirement plan\)](#)

ON DEMAND

Investing can be the most powerful way for your money to make money.

[The mid-year check-in](#)

ON DEMAND

Whether you are single or part of a couple, it's a great time to see if you are on track with your goals.

[Are you making the most of your workplace benefits?](#)

ON DEMAND

Learn about how to make the most of your workplace benefits.

[Financial self-reliance: Investing in your future self](#)

ON DEMAND

Investing isn't just for retirement—It can help give you choices throughout your life.

[Getting your whole family investing](#)

ON DEMAND

About 70% of women wish they'd started investing earlier. That's why involving the whole family can help start (and maintain) a strong foundation.

MANAGING LIFE

[When caregiving gets \(even more\) complicated](#)

ON DEMAND

What it means to leave work to care for loved ones and how to reduce the financial impact.

[Navigating through a divorce](#)

ON DEMAND

Help to successfully navigate the challenges of a divorce to make it easier and more equitable.

[Strategies for student loan debt](#)

ON DEMAND

Learn about the ways to manage student loan debt, including how it fits in with retirement and other financial goals.

[Moms and money](#)

ON DEMAND

Understand the unique financial challenges that caregivers face and ideas on how to navigate the hidden costs of caregiving.

[Why you probably need more life insurance](#)

ON DEMAND

Did you know that as a woman, you are less likely to have life insurance? And that if you are insured, you are likely to have less coverage?

[Should you pay down debt or invest?](#)

ON DEMAND

Deciding what to pay (and when) can be a little bit easier when you have a formula.

PREPARING FOR RETIREMENT

[Getting more from Social Security](#)

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When and how to claim Social Security is particularly important for women. A number of factors can influence how much you receive and your eligibility.

[Retiring early](#)

ON DEMAND

The age you retire can make a big difference, both in terms of retirement lifestyle and finances. It can have an even higher cost for women because of longevity.

[Rethinking retirement](#)

ON DEMAND

Valuable information to help you reassess your retirement planning and understand how much you might need to cover whatever comes your way.

[Planning for health care costs in retirement](#)

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Understand the impact longevity has on preparing for the cost of health care in retirement

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VIRTUAL LIVE EVENTS

Join us for real talk and helpful tips about money, investing, careers, and more. Women Talk Money helps you get answers to your top money questions and provides how-to guides to walk you through your next best money steps.

Women Talk Money Events
2nd Wednesday of the month
2 PM ET / 11 AM PT

4th Thursday of the month
12 PM ET / 9 AM PT

*Episodes feature a live channel call-to-action

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