May 2020 Financial Webinars

Feeling confident about your personal finances can be tough during or after a pandemic. Learn more about how to follow a plan and take control of your financial future with confidence. *Note: The following webinars are free to attend. The webinars will be recorded and sent to anyone who registers.*

Four Ways to Rebuild Money Confidence: Controlling Spending
Friday, May 8 at 12:00 pm Eastern
This class explains the importance of starting your plan with "controlling spending" and helps you get started.
Register here

Investor Education: Choosing Investments after Assessing Your Goals and Risk Tolerance
Friday, May 8 at 3:00 pm Eastern
During this event, we'll provide guidance on how you might do your own research versus partnering with a professional. Lastly, we will spend a little time on planning for future college expenses, examining the pros and cons of different types of savings accounts.
Register here

Four Ways to Rebuild Money Confidence: Managing Debt
Friday, May 15 at 12:00 pm Eastern
This class explains the importance of each component of your plan and focuses on "managing debt" and available strategies to help you get started.
Register here

Investor Education: How Family Dynamics Influence Investment Goals
Friday, May 15 at 3:00 pm Eastern
We will provide tips and activities that can help make investing a family affair, and help you feel more confident about prioritizing and saving for different goals. Bonus: we'll also include some important estate planning exercises.
Register here

Four Ways to Rebuild Money Confidence: Prioritizing Savings
Friday, May 22 at 12:00 pm Eastern
This class explains the importance of each component of your plan and focuses on "prioritizing savings" to help you get back on track with your short, medium, and long-term goals.
Register here

Investor Education: Building a Portfolio to Match Your Retirement Date

Friday, May 22 at 3:00 pm Eastern

In this session, we will review pertinent investment principles and disciplines, the importance of accurately estimating your retirement lifestyle budget and some helpful planning tools. We'll also talk about how to take the initial steps in building your portfolio, as well as how to access additional support and resources if desired.

Register here

Four Ways to Rebuild Money Confidence: Maintaining Excellent Credit

Friday, May 29 at 12:00 pm Eastern

This class explains the importance of each component of your plan and focuses on helping you rebuild and "maintaining excellent credit."

Register here

Investor Education: Creating Your Retirement Paycheck

Friday, May 29 at 3:00 pm Eastern

During this session, we will review potential sources of income in retirement and their related tax considerations. Our goal is to raise awareness of possible adjustments to your investment plan that could increase the odds of your retirement dream becoming a reality.

Register here