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PARTICIPANT EDUCATION EXPERIENCE

WEBINAR LINEUP

JAN 21
Understanding the Importance of Social Security Claiming Decisions
Replay **HERE** | Passcode: Oswald@0126

MAR 18
The Essential Guide to Preparing, Applying, and Paying for College
Register **HERE** | **11am EST**

APR 30
Estate Planning Made Easy: Ensuring Your Legacy & Empowering Your Heirs
Register **HERE** | **4pm EST**

MAY 13
Financial Foundations: Smart Budgeting & Debt Management
Register **HERE** | **12pm EST**

JUNE 17
Retirement Isn't an Age - It's a Plan: Are You Ready?
Register **HERE** | **4pm EST**

SEPT 10
Identity Theft: What Can I Do to Protect Myself?
Register **HERE** | **4pm EST**

OCT 7
Medicare Made Simple: A Complete Overview of Your Choices
Register **HERE** | **12pm EST**

ONLINE LIBRARY

How We Work With Individuals

Roth vs. Traditional

F(un)AQs – Getting Started, Approaching & During Retirement

Borrowing From Your Retirement Account

Importance of Rebalancing Your Portfolio

Distribution Options

Cyber Security

Social Security Basics

Medicare Basics

Long–Term Care

Estate Planning Essentials

Inflation & Interest Rates Explained

Practicing Well–Being & Stress Management

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