

2024 Live Educational Webinars

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JANUARY

- 1/10** Understanding the Benefits of Your Retirement Savings
- 1/17** Psychology of Money
- 1/24** 2024 Market Outlook

FEBRUARY

- 2/7** Building Strong Financial Strategies for the Black Community
- 2/14** Getting Retirement Ready
- 2/15** Tax-Aware Strategies for 2024
- 2/21** Caregiving: Financial Considerations

MARCH

- 3/6** Your Goal: Retirement
- 3/13** The New Face of Wealth is Female
- 3/15** Tax-Aware Strategies for 2024
- 3/20** Financial Strategies for Equity

Preparing for your 2023 Tax Filing

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APRIL

- 4/10** Investing 101
- 4/17** Financial Planning for Retirement
- 4/24** Setting Up Your Equity Compensation for Success

MAY

- 5/8** Uniting Lives and Finances: Money Considerations for Young Couples
- 5/15** Understanding the Benefits of Your Retirement Savings
- 5/22** Building Strong Financial Strategies for the AAPI Community

JUNE

- 6/5** Financial Strategies for LGBTQ+ Community
- 6/12** Getting Retirement Ready
- 6/19** Budgeting 101
- 6/26** Market Outlook: Responding to the Moment

JULY

- 7/17** Path to Financial Wellness
- 7/24** Your Goal: Retirement
- 7/31** Taking Control of Your Finances

AUGUST

- 8/7** Education Expense Planning
- 8/21** Financial Planning for Retirement
- 8/28** Money Considerations for the Financially Single

SEPTEMBER

- 9/4** Legacy & Estate Planning
- 9/11** Planning for the Unexpected
- 9/18** Understanding the Benefits of Your Retirement Savings
- 9/25** Market Outlook: Responding to the Moment

OCTOBER

- 10/9** Building Strong Financial Strategies for the Hispanic and Latino Community
- 10/16** Investing 201
- 10/23** Raising Money-Savvy Kids
- 10/30** Understanding the Benefits of Your Retirement Savings

NOVEMBER

- 11/6** In the Middle with You: Financial Considerations for the Sandwich Generation
- 11/13** Taking Command of Your Financial Life: Considerations for Veterans
- 11/14** Tax Considerations for Year End 2024
- 11/20** Getting Retirement Ready
- 11/21** Tax Considerations for Year End 2024

DECEMBER

- 12/4** Understanding Your Workplace Benefits
- 12/11** Your Goal: Retirement
- 12/18** Market Outlook: Responding to the Moment

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