SageView Presents: Money Matters

FINANCIAL WELLNESS WORKSHOP

Join SageView for a two-part webinar series hosted by our National Education Team as we cover eight essential financial topics everyone should know. Each 90-minute workshop will have four, 20-minute webinars led by experienced SageView advisors. After each session you’ll receive a one-page flyer with key concepts for you to keep!

Your can join us for the whole workshop or just attend specific sessions -- it’s up to you!

**SPRING WORKSHOP**

**Wednesday, May 26, 2021**

11:00 am PDT / 2:00 pm ET

**11:00 am** Introduction

**11:10 am** Investing Basics
Principles to know and put into practice

11:30 am Roth vs. Traditional Retirement Plan
What’s similar, what’s different, what’s right for you?

11:50 am Emergency Savings and Budgeting
Getting started and staying on track

12:10 pm Healthcare in Retirement
Your quick guide to Medicare, long-term care and more

**FALL WORKSHOP**

**Wednesday, September 22, 2021**

11:00 am PDT / 2:00 pm ET

**11:00 am** Introduction

**11:10 am** Social Security
Five facts everyone should know

11:30 am College Savings 529 Plans
Understanding tax and other benefits

11:50 am HSAs and FSAs
Tax-advantaged savings for your healthcare needs

12:10 pm Making Your Money Last in Retirement
Know how much you’ll need and key expenses to keep in mind

*Register Now*