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 HSA[2]

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 HSA[2]

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 & Advice[3]

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 Plan[1]

- 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

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

*Available in Spanish

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LONG TERM

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Save for a big purchase (home)

CHALLENGES/FOCUS

Rebound from financial setback

Build financial literacy skills

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

Your College Savings Options

ON DEMAND VIRTUAL LIVE

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

A Woman's Guide to Building a Financial Plan

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Start reducing your debt with four clear steps
- Organize your budget and identify how much you may need for retirement
- Confidently design a financial plan to help meet your unique goals

A Woman's Guide to Investing Beyond Retirement

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Create short-term and long-term savings goals
- Choose an investment approach based on your personal preferences
- Establish a plan to help protect your assets

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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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

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- 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

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

Navigating Market Volatility*

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- Learn the history of market conditions
- Understand the importance of having a plan
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- Estimate retirement health care costs
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Preserving Your Savings for Future Generations[4]

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- 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

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- Understand why retirement planning is different for women
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Your College Savings Options

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SHORT TERM

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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

A Woman's Guide to Building a Financial Plan

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- Start reducing your debt with four clear steps
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- Create short-term and long-term savings goals
- Choose an investment approach based on your personal preferences
- Establish a plan to help protect your assets

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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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

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Five Money Musts

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- Start thinking about retirement

Fidelity Personalized Planning & Advice[3]

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Fundamentals of Retirement Income Planning

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- Learn the benefits of a retirement income plan
- Identify retirement income sources and expenses
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- See if you're saving enough
- Learn ways to save more

Guiding You Through Your Equity Plan[1]

- 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*

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- 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*

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

Make the Most of Your Retirement Savings*

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- Learn the benefits of saving more
- Identify different retirement account types
- Explore ways to preserve and grow savings

Making the Most of Your Stock Plan[4]

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

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- Know how to assess spending and take control of a budget
- Consider reasons for taking money from a workplace savings plan
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SHORT TERM

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LONG TERM

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Retire comfortably

CHALLENGES/FOCUS

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Maximize Social Security in Your Retirement Strategy

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- Learn how Social Security fits your retirement paycheck
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Navigating Market Volatility*

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- Learn the history of market conditions
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Prepare for the Reality of Health Care in Retirement

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

Preserving Your Savings for Future Generations[1]

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- 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

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- 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 Update[3]

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
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Tackle Debt and Understand Your Credit Score

VIRTUAL LIVE – *30 minutes*

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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

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- Understand tax forms you will need and where to find them
- Learn about the resources to help guide you during tax season

Quarterly Market Update[4]

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 Plan[3]

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

[1]Available 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.
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[4]Only available during the second month of each quarter.

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

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]

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

Guiding You Through Your Equity Plan[1]

- 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

Making the Most of Your Stock Plan[2]

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

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

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 Generations[3]

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 Update[4]

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Fidelity On Demand Webcasts

Empowering conversations with experienced panelists who explore the connection between our finances and overall wellbeing.

SAVING & INVESTING

Fidelity Viewpoints: Basics for Managing Your Money
ON DEMAND
Understand the fundamentals of budgeting your money, managing debt, controlling spending, saving more, and investing for the future.

Fidelity Viewpoints: Market Sense
ON DEMAND VIRTUAL LIVE
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.)

MANAGING LIFE

Fidelity Viewpoints: Protecting Yourself in a Digital World
ON DEMAND
Protect yourself from threats to your personal information.

Fidelity Viewpoints: Your Home - Make the Right Money Moves
ON DEMAND
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
ON DEMAND
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.com/webcasts

- All webcasts are available to watch at any time and no registration is required.
- Start, stop, and pick up where you left off
- Share with family and friends
- Access a range of educational resources and tools

LATEST WEBCASTS

Fidelity Viewpoints: Market Sense
ON DEMAND VIRTUAL LIVE
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.)

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: 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.

Women Talk Money Virtual Events*

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

Are you making the most of your workplace benefits?
ON DEMAND
Learn about opportunities to help dial up retirement savings, options for caregiving and additional wellness support, and more.

Are you making a money resolution for the new year?
ON DEMAND
Reflections on what you've been doing with your money and where you want to go.

Unlock your money's full potential
ON DEMAND
Learn about what makes a "recipe for success" when it comes to building healthy money habits and taking a next step towards goals.

Singles & Money: Owning your future
ON DEMAND
Whether happily solo or embracing solo as a new chapter, learn tips and actionable steps to help thrive financially on your own.

Secrets to building money, wellness, and career success
ON DEMAND
Explore the secrets to success when it comes to talking control of finances, cultivating personal well-being, and building a thriving career.

3 power moves to fund your future
ON DEMAND
Learn how to leverage IRAs, HSAs, and other investing opportunities to make the most of your savings. adjust your mindset and routine.

How to start investing: A hands-on demo
ON DEMAND
Get real-time answers to live questions on how to get started with investing.

Couples & Money: Planning together for the future you want
ON DEMAND
Learn about the keys to success in navigating finances as a couple.

PREPARING FOR RETIREMENT

Planning for health care and long-term care in retirement
ON DEMAND
Get answers to top questions on how to estimate potential costs, to understanding options for insurance and long-term care, and get help developing a plan.

Building a plan to help your retirement savings last a lifetime
ON DEMAND
Learn how to build a plan that can help grow savings, generate income and provide a personal "paycheck" each month.

Getting ready to thrive in retirement
ON DEMAND
Learn how to plan for the financial transition as well as ways to

Your guide to estate planning essentials
ON DEMAND
Learn why estate planning is an important step in the planning process and how it can benefit you and your loved ones.

netbenefits.com/womentalkmoney

- Share with family and friends
- Access a range of educational resources and tools

Women Talk Money – YouTube

- Always on, one-stop shop for past, present, and future events
- Start, stop, and pick up where you left off

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

*Episodes feature a live channel call-to-action

IMPORTANT INFORMATION

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