

# Education by Empower series - 2026

## Opportunities for employee engagement with hot topics\*

Third week of every month: Tuesday at 10 a.m., 1 p.m., 4 p.m., Wednesday at 11 a.m., 2 p.m., 6 p.m., & Thursday at 12 p.m., 3 p.m., & 5 p.m. (Spanish), all ET

Fourth week of every month on Tuesday at 10 a.m., 1 p.m., 4 p.m. , Wednesday at 12 p.m., 3 p.m., 5 p.m., & Friday at 11 a.m. & 2 p.m. all ET.

| January                                     | February                         | March                                                     | April                            | May                    | June                   |
|---------------------------------------------|----------------------------------|-----------------------------------------------------------|----------------------------------|------------------------|------------------------|
| Building a foundation of financial wellness | Introduction to tax planning     | Maximize your savings with an experience built around you | Advanced investing in any market | Sandwich generation    | Retirement Readiness   |
| 20, 21, 22, 27, 28, 30                      | 17, 18, 19, 24, 25, 27           | 17, 18, 19, 24, 25, 27                                    | 14, 15, 16, 21, 22, 24           | 19, 20, 21, 26, 27, 29 | 16, 17, 18, 23, 24, 26 |
| July                                        | August                           | September                                                 | October                          | November               | December               |
| Estate planning                             | A closer look at Social Security | Planning for healthcare expenses                          | Navigating financial setbacks    | Thriving in retirement | Retirement myths       |
| 21, 22, 23, 28, 29, 31                      | 18, 19, 20, 25, 26, 28           | 15, 16, 17, 22, 23, 25                                    | 20, 21, 22, 27, 28, 30           | 17, 18, 19, 24, 25     | 15, 16, 17, 22, 23     |

\*Sessions are live and available in Spanish.

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**Building a foundation of financial wellness:** Explore financial aspects that affect everyone's life, hear personal experiences, and steps to take toward financial wellness.

**Introduction to tax planning:** Understanding types of taxes, tax-filing information and forms, tax brackets, tax minimization strategies, methods of and common tax filing errors.

**Maximize your savings with an experience built around you:** A look at your savings, saving in your plan, and resources designed for you.

**Advanced investing in any market :** Strategies for navigating advanced investing and understanding market volatility.

**Sandwich generation:** Caring for both aging parents and your own children at the same time, maintaining balance and juggling the needs of parents, children, and yourself, plus how to prepare financially.

**Retirement readiness:** What is retirement readiness? How much does it take to retire? Estimating and factoring in Social Security.

**Estate planning:** What estate planning is, benefits of an estate plan, components and documents.

**A closer look at Social Security:** What is Social Security, when to take it, how pensions affect Social Security, spousal benefits.

**Planning for healthcare expenses:** Understanding healthcare costs, what you need to know about Medicare, and planning for potential expenses.

**Navigating financial setbacks:** A look at economic impacts, ways to overcome financial setbacks and landing on your feet after a set back.

**Thriving in retirement:** Considerations for your retirement years including budgeting, investing, accessing your savings and putting your financial affairs in order.

**Retirement myths:** Facts vs fiction - Account security, accessing your money, fees and expenses, and more.



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