

# PERSONAL SAGE

Strategic Advice Guidance and Empowerment

## 2023 Financial Wellness Workshops

Join us for live financial wellness workshops hosted by our Financial Coaching Team. Each quarter's 60-minute workshop is comprised of three 20-minute sessions on different topics. Each themed workshop is offered three times throughout the quarter.

Click below to register for the day that works for you.

### Healthy Habits

📅 January 24 • February 21 • March 21

🕒 11am PT / 2pm ET

#### Automating Healthy Financial Habits

*Save more for emergencies, retirement, and other financial goals*



Patrick  
Abelon

#### Debt Management and Prioritizing Your Savings

*What comes first: retirement savings, emergency savings or paying off debt?*



Dee  
Spivey

#### Keep Your Future in Sight

*Staying on track with your finances when major life events occur*



Shana  
Aleem

[Click to Register Now](#)

### Q2 – Investment Insights

📅 April 18 • May 23 • June 21

🕒 11am PT / 2pm ET

#### Target-Date Funds

*Do it myself or do it for me? A deep dive into understanding TDFs and all the investment options in your retirement plan*



Evan  
Lamb

#### The Power of 1%

*Small changes make a big impact in retirement*



Charlotte  
Valentino

#### Time-Tested Investment Strategies for the Long-Term

*Investing through periods of market volatility and uncertainty*



Jack  
Lockwood

[Click to Register Now](#)

### Q3 – Retirement Readiness

📅 July 18 • August 22 • September 19

🕒 11am PT / 2pm ET

#### Taxes in Retirement

*Strategies for drawing down assets in retirement*



Nick  
Fallor

#### Social Security

*Five facts everyone should know*



Jared  
Remesz

#### No Regrets Retirement

*Addressing retirement risks and making your money last*



Margarita  
Cross

[Click to Register Now](#)

### Q4 – Financial Fitness

📅 October 24 • November 14 • December 12

🕒 11am PT / 2pm ET

#### College Savings 529 Plans

*Understanding the tax and other benefits*



Nick  
Lamb

#### HSAs and FSAs

*Tax-advantaged savings for your healthcare needs*



Michelle  
Klein

#### Roth vs. Traditional 401(k)

*What's similar, what's different, what's right for you?*



Eric  
Weissman

[Click to Register Now](#)