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

PAYCHECK TO PAYCHECK

Appropriate for: Employees facing first-time financial decisions and those juggling multiple priorities. Focuses on helping employees weigh the pros and cons of key life decisions, assess spending and saving, prepare for the unexpected, and control 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

Learn the Basics of When and How to Claim Social Security*

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Learn about Social Security
- Understand considerations for claiming Social Security benefits
- Decide when to take Social Security benefits

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

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

Navigating Market Volatility*

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Consider if you should change your investments
- Understand how to pull money out of the market and the effects of moving to cash
- Learn why to consider saving more in a workplace savings 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

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

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

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

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

*Available in Spanish

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ONSITE LIVE | ON DEMAND | VIRTUAL LIVE

FOUNDATION BUILDERS

Appropriate for: Employees who need help with the basics. Focuses on building foundational skills and helping employees take steps toward increasing savings and controlling debt while preparing for major financial decisions.

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

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

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- See if you're saving enough
- Learn ways to save more

Identify and Prioritize Your Savings Goals*

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Learn how to save for each goal
- Get next steps for saving

Invest Confidently for 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

Managing My Money*

ONSITE LIVE ON DEMAND VIRTUAL LIVE

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Manage Unexpected Events and Expenses

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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

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- Understand if a plan loan or withdrawal is right for you
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*Available in Spanish
[1]Available for participants in the U.S. and outside the U.S. Workshop only available for stock plans administered by Fidelity.

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ONSITE LIVE | ON DEMAND | VIRTUAL LIVE

PRIORITY BALANCERS

Appropriate for: Employees balancing multiple priorities and multiple goals. Focuses on helping employees make financial decisions that balance short- and long-term goals, while managing debt and maximizing savings.

Get a Handle on Your Current Student Loan Debt

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- Understand a wide range of student loan repayment options
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Identify and Prioritize Your Savings Goals*

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- Learn how to save for each goal
- Get next steps for saving

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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

Making the Most of Your Stock Plan[3]

ONSITE LIVE ON DEMAND VIRTUAL LIVE

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

Managing My Money*

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Navigating Market Volatility*

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- Consider if you should change your investments
- Understand how to pull money out of the market and the effects of moving to cash
- Learn why to consider saving more in a workplace savings plan

Organize, Plan, and Own Your Future

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Explore what financial wellness means for women
- Learn the principles of budgeting and saving
- Discover how to design an investing plan to meet specific goals
- See how defining an investing personality can help keep you on track

Take the First Step to Investing*

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- Review the basics of investing
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[2]Only available for HSA plans administered by Fidelity.
[3]Available for participants in the U.S. Workshop only available for stock plans administered by Fidelity.

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ONSITE LIVE | ON DEMAND | VIRTUAL LIVE

PRIORITY BALANCERS (continued)

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Create a Budget and Build Emergency Savings

VIRTUAL LIVE – *30 minutes*

- Learn about different components of a budget
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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
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- Know the difference between a Roth IRA and the Roth option in your workplace savings plan

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ONSITE LIVE | ON DEMAND | VIRTUAL LIVE

FINANCIALLY ESTABLISHED

Appropriate for: Financially established employees navigating more complicated life events. Focuses on preparing for retirement and ways to help make their money work even harder for them.

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

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

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

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

Navigating Market Volatility*

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Consider if you should change your investments
- Understand how to pull money out of the market and the effects of moving to cash
- Learn why to consider saving more in a workplace savings plan

Organize, Plan, and Own Your Future

ONSITE LIVE ON DEMAND VIRTUAL LIVE

- Explore what financial wellness means for women
- Learn the principles of budgeting and saving
- Discover how to design an investing plan to meet specific goals
- See how defining an investing personality can help keep you on track

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

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

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

Your College Planning Choices

ON DEMAND VIRTUAL LIVE

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

*Available in Spanish
[1]Only available for HSA plans administered by Fidelity.
[2]Only available for plans that offer FPPA.
[3]Fidelity does not provide legal or tax advice. The information herein is general in nature and should not be considered legal or tax advice. Consult an attorney or tax professional regarding your specific situation.
[4]Not available during the first month of each quarter.

Fidelity Special Event Webcasts

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

SAVING & INVESTING

Fidelity Viewpoints: Tackle Your Financial To-Do List
ON DEMAND
Get clear next steps on how to organize your financial life.

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: When to Question Your Financial Instincts
ON DEMAND
Examine how your emotions and current events can affect your financial decisions - and what to do about it.

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

Job Changes: Managing the Emotional & Financial Impact
ON DEMAND
Understand key considerations for those experiencing a furlough, layoff, or early retirement

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

Fidelity Viewpoints: Making Sense of Medicare
ON DEMAND
How and when to enroll, Medigap and Medicare Advantage plans, and Parts A, B & D

Don't Let Healthcare Costs in Retirement Surprise You
ON DEMAND
Avoid surprises by understanding key terminology and knowing your options

Are You Emotionally Ready to Retire?
ON DEMAND
Prepare yourself mentally for the day retirement arrives

Your Retirement Transition: Go from Saving to Spending
ON DEMAND
Understand why a retirement income plan that's targeted to your unique situation can help you achieve the life you've envisioned

Social Security: Make Your Decisions with Confidence
ON DEMAND
What you need to know to get the most out of your Social Security benefits

Fidelity Viewpoints®: Building Your Bridge to Medicare
ON DEMAND
Here's what you need to know if you find yourself without health insurance before you turn 65.

Fidelity.com/webcasts

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- Start, stop, and pick up where you left off
- Share with family and friends
- Access a range of educational resources and tools

LATEST WEBCASTS

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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.)

More Help. More Insights. More Webcasts Are on the Way.
Check back here often for new and updated webcasts. Topics will focus on overall financial wellness and how to plan for your future.

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

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

Investing (beyond your retirement plan)
ON DEMAND
Investing can be the most powerful way for your money to make money.

The mid-year check-in
ON DEMAND
Whether you are single or part of a couple, it's a great time to see if you are on track with your goals.

5 investing conversations to have now
ON DEMAND
Learn about the top 5 questions to ask yourself and others to help you save and invest (more!).

Financial self-reliance: Investing in your future self
ON DEMAND
Investing isn't just for retirement—It can help give you choices throughout your life.

Getting your whole family investing
ON DEMAND
About 70% of women wish they'd started investing earlier. That's why involving the whole family can help start (and maintain) a strong foundation.

*Episodes feature a live channel call-to-action

MANAGING LIFE

Planning for caregiving
ON DEMAND
What it means to leave work to care for loved ones and how to reduce the financial impact.

Navigating through a divorce
ON DEMAND
Help to successfully navigate the challenges of a divorce to make it easier and more equitable.

Strategies for student loan debt
ON DEMAND
Learn about the ways to manage student loan debt, including how it fits in with retirement and other financial goals.

Moms and money
ON DEMAND
Understand the unique financial challenges that caregivers face and ideas on how to navigate the hidden costs of caregiving.

Why you probably need more life insurance
ON DEMAND
Did you know that as a woman, you are less likely to have life insurance? And that if you are insured, you are likely to have less coverage?

Should you pay down debt or invest?
ON DEMAND
Deciding what to pay (and when) can be a little bit easier when you have a formula.

PREPARING FOR RETIREMENT

Getting more from Social Security
ON DEMAND
When and how to claim Social Security is particularly important for women. A number of factors can influence how much you receive and your eligibility.

Retiring early
ON DEMAND
The age you retire can make a big difference, both in terms of retirement lifestyle and finances. It can have an even higher cost for women because of longevity.

Rethinking retirement
ON DEMAND
Valuable information to help you reassess your retirement planning and understand how much you might need to cover whatever comes your way.

Planning for health care costs in retirement
ON DEMAND
Understand the impact longevity has on preparing for the cost of health care in retirement

netbenefits.com/womentalkmoney

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- Access a range of educational resources and tools

VIRTUAL LIVE EVENTS

Join us for honest conversations about the financial realities of being a women. During these events, we answer your questions on a broad range of topics to help you get and stay on track with your financial goals.

Women Talk Money
2nd Wednesday of the month
2 PM ET / 11 AM PT

Women Talk Money Workshop
4th Thursday of the month
12 PM ET / 9 AM PT

Ask Fidelity

Helping employees get the answers they need to make informed financial decisions – when they need it most.

REVIEW PLAN OPTIONS

These sessions cover topics such as workplace savings plans and options, retirement plan changes, and online navigation.

A Retirement Plan vs. an Individual Retirement Account

When it comes to saving for retirement, there are two basic options that are most common, a retirement plan and an individual retirement account. Explore the features of both to help you make informed decisions.

Making the Most of Your Non-Qualified Retirement Plan

Learn how a non-qualified retirement plan can help you save for your retirement.

Put the Power of NetBenefits to Work for You

Did you know that there's more to do in NetBenefits than checking your balance? Come on a tour and discover the powerful resources that can help you plan, track, and save for retirement.

Saving Through Roth Contributions in My Retirement Plan

Understand the options for saving pre-tax or after-tax (Roth) money in your workplace retirement savings plan so you can decide what's right for your situation.

Understanding Your Retirement Plan and All it Has to Offer

Your employer's retirement plan is an essential part of planning for your future. Learn how it works, from contributions to investment options, so you can make the most of this important benefit.

Upcoming Retirement Plan Changes

Your retirement plan is changing. Fidelity is here to help you navigate the changes so you may understand your available options.

What is a Roth In-Plan Conversion?

Your retirement plan offers many ways to save for the future. Learn more about your options, including how to convert after-tax dollars to a Roth using an in-plan conversion

ENROLL AND INVEST

These sessions cover topics such as foundational financial topics including how to save, enroll, and invest.

Finding an Investment Style to Fit Your Needs

Managing for retirement isn't easy but Fidelity is here to help. Learn about different ways Fidelity can help you manage your retirement savings.

How Consolidating Accounts Could Help You Save Time and Money

Learn how consolidating your retirement accounts could help simplify your financial life.

How to Make the Most of Your Retirement Savings

How much is "enough" for retirement? Learn strategies that can help you save more today and tips for preserving and growing your savings in retirement.

Making Your Money Work as Hard as You Do[2]

See what options are available and what you need to know to get started with investing.

Navigating Market Volatility

Learn about the importance of having a plan and staying the course, investing best practices, and common pitfalls to avoid during volatile markets. The goal is for you to establish a plan if you don't have one, feel comfortable with your plan, and know where to get help.

Resetting Your Financial Foundation[2]

Whether it's prioritizing expenses and debt or saving for the future, it's important to review your saving and spending to get clarity on where your money is going.

Saving and Investing Beyond Your Retirement Plan

Saving for retirement, but need help with your short-term financial goals? Learn the basics of investing, and the different types of accounts, so you can optimize your savings to help you reach your goals.

The Tax (and Personal) Benefits of Charitable Giving

Many people contribute cash to their favorite charities, but there are additional options to consider. Learn more about other tax-effective ways to give.

[1]Only available for plans that offer FPPA.
[2]Women's Investing topic

Ask Fidelity

Helping employees get the answers they need to make informed financial decisions – when they need it most.

TRANSITION TO RETIREMENT

These sessions cover topics for pre-retirees, including important considerations, Social Security, and income planning.

Creating the Retirement You Want[1]

Whether you're planning as a couple or on your own, it's important for women to plan for higher retirement expenses (especially health care costs) and be strategic about when to claim Social Security.

Discover the Potential of Your Health Savings Account[2]

Understand the benefits of saving and investing money in a Health Savings Account to help you prepare for medical expenses now and in retirement.

How to Plan for the Income You'll Need in Retirement

How do your financial resources turn into income in retirement? It starts with a plan. Learn how to create a retirement income plan and explore the risks that can impact it.

Planning for Health Care Costs and Coverage in Retirement

Health care costs in retirement can affect your savings and lifestyle. Explore how to prepare for the reality of health care costs in retirement.

The Role Roth IRAs Can Play in Retirement

There is power behind the Roth IRA. Learn more about how you can take advantage of this savings vehicle for your retirement portfolio.

Top Things to Do Before You Retire

Wish you had a to do list to help you prepare for retirement? Learn how to get your financial house in order and other important considerations that can impact your decisions.

Understanding the Basics of Social Security

Social Security may be an important income source for retirement. Learn about key Social Security claiming ages and how your benefit is calculated, so you can better understand the choices.

FINANCIAL WELLNESS

These sessions cover financial wellness and potential ways to feel good about your financial plans.

Buying a Home

Home ownership can be rewarding but there are several factors to consider, some which may not be obvious to the first time (or even seasoned!) buyer.

Caring for a Loved One With Disabilities

Resources, tips, and tools to help care for yourself and your loved ones with disabilities.

Caring for an Aging Loved One

Aging is a part of life. We will discuss how to prepare a plan with and for your loved one, navigate common concerns, and prioritize your own self-care in the process.

Creating a Budget You'll Actually Use

Planning out your spending, and living within a budget, is all about freedom. Learn how to create a budget you'll use, so you're prepared for the unexpected, and able to pursue what's important to you.

Demystifying Your Credit Score

Lenders use credit scores to decide whether to offer credit, and under what terms. Discover what goes into your credit score and how it's calculated, to understand the impact it has on your borrowing.

Estate Plans Can Help Protect What Matters Most[3]

If you haven't created an estate plan yet, you'll be surprised how many topics it covers. Learn five steps to consider when preparing to meet with your estate planning professional.

Life Events: College Planning - Navigating the Road to Admissions

College planning, for parents and child, is about more than saving money. We can help on key steps from saving, preparing, applying and choosing.

Setting Goals and Habits That Stick[1]

You can start by identifying or revisiting what you want your money to achieve and setting up good habits to create lasting change.

Understanding Your Debt So You Can Take Control

Would you like to get a handle on your debt, once and for all? Discover real strategies to help you prioritize what to payoff first and tips for managing your spending.

What is Financial Wellness and Why Is It Important?

Being well prepared to handle any financial crisis, that's financial wellness. Learn how to prioritize your needs and wants, so you can pay today's bills while saving for your future goals.

Why a Savings Plan Should Be Important to You

We're all trying to save for something—like an emergency, car, home, or retirement. Learn how to create a plan so you can optimize your saving and investing to help you reach them.

[1]Women's Investing Topic
[2]Only available for HSA plans administered by Fidelity.
[3]Fidelity does not provide legal or tax advice. The information herein is general in nature and should not be considered legal or tax advice. Consult an attorney or tax professional regarding your specific situation.

MEET THE PERSONAS

PAYCHECK TO PAYCHECK

Goals:

Meet expenses and still have a little extra left over each pay period

Be ready for that unexpected bill that inevitably will come their way

Control and begin to pay down debt

FOUNDATION BUILDERS

Goals:

Lay a financial foundation

Learn the skills to make major financial decisions for the first time, such as buying a home and leasing a car

Balance savings with managing student and consumer debt

PRIORITY BALANCERS

Goals:

Feel confident as stewards for finite resources

Accelerate savings to meet short-term needs while also focusing on creating an income stream for retirement

Manage debt and build up emergency funds

FINANCIALLY ESTABLISHED

Goals:

Maximize savings and benefits while minimizing taxes

Learn to make key retirement and health care decisions

Protect and efficiently transfer the savings they've worked hard to accumulate

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