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REGISTER NOW

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The SECURE Act

The SECURE Act (Setting Every Community up for Retirement Enhancement Act), passed on December 20, 2019, made sweeping changes to the retirement plan landscape. Learn about the changes and how they impact your retirement planning considerations.

March 16 at 9 am (PT)

Strategies for staying on track

No matter how much or how little money you can save for retirement, it's important that you start now and stay invested for your future. You can learn how taking smart financial steps today, may help lead you to a solid financial future after you've stopped working.

March 16 at noon (PT)

Social Security basics

Social Security will likely play a significant role in building your retirement income. Learn the basics about Social Security including eligibility, how to apply, how your benefit is calculated and strategies for claiming benefits.

March 17 at 9 am (PT)

Retiring in the new normal

We all know how important it is to save for retirement. This presentation brings many of the risks to light so you have a better understanding of what you may be facing and what you can do about it, especially in this new environment. Namely, shifting your strategy from just growing your money to protecting what you've saved as it grows. And for those still working, we'll talk about protecting your income in retirement, by creating a guaranteed income stream to help cover essential expenses and next steps you can take to help protect your retirement future.

March 17 at noon (PT)

BUILT TO PERFORM.

CREATED TO SERVE.

Understanding Medicare

Paying for healthcare in retirement is a critical part of financial planning, and it is important to understand how Medicare operates and what choices you have. This webinar will help you understand some aspects of Medicare, including eligibility and what plans are available to you. We hope that you will join us for this educational event.

March 18 at 9 am (PT)

Home buying 101: A financial primer for first-time home buyers

Buying your first home is a big deal and comes with lots of new experiences—and expenses—along the way. Get expert insights on the key steps and considerations for your home buying journey, including the three phases: preparing to search, finding your home and getting to closing.

March 18 at noon (PT)

Social Security strategies for married couples

Married couples can take advantage of some strategies that may help to increase lifetime Social Security benefits. You can learn the basics about spousal benefits, understand the many variables involved in claiming strategies and how married couples can boost their benefits by coordinating the timing of their claims.

March 23 at 9 am (PT)

Estate planning basics

Ensuring that our assets will pass to loved ones, and causes that are near and dear is important to most of us. Discover the components of a basic estate plan and strategies to ensure that your wishes are met.

March 24 at 9 am (PT)



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