

PERSONAL SAGE

Strategic Advice Guidance and Empowerment



2024 Financial Wellness Workshops

Join us for live financial wellness workshops hosted by our financial experts. Each quarter's 60-minute workshop comprises 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.**

Q1 Healthy Habits

JAN 24 | FEB 21 | MAR 20

11am PT / 2pm ET

[Click to Register Now](#)

Automating Healthy Financial Habits

Save more for emergencies, retirement, and other financial goals

Debt Management & Prioritizing Your Savings

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

Credit: Understand it, Build it, Secure it

Protect your assets

Q2 Investment Insights

APR 17 | MAY 22 | JUNE 26

11am PT / 2pm ET

[Click to Register Now](#)

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

The Power of 1%

Small changes make a big impact in retirement

Inflation and Interest Rates

Maximizing your money: navigating major purchases, financial planning and market fluctuations

Q3 Retirement Readiness

JULY 24 | AUG 21 | SEPT 18

11am PT / 2pm ET

[Click to Register Now](#)

Taxes in Retirement

Strategies for drawing down assets in retirement

Healthcare in Retirement

Medicare options and long-term care

Your Financial Legacy

Preparing for the unexpected: Trusts, wills & estate planning

Q4 Financial Fitness

OCT 23 | NOV 13 | DEC 11

11am PT / 2pm ET

[Click to Register Now](#)

College Savings 529 Plans

Understanding the tax and other benefits

HSAs and FSAs

Tax-advantaged savings for your healthcare needs

Roth vs. Traditional 401(k)/403(b)

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