Financial Education

Workshop Series

Endeavor Health

Fidelity INVESTMENTS

Join a virtual workshop in 2025 hosted by Endeavor Health and Fidelity Investments and feel more confident about your finances.

To register, click on the times of workshops you're interested in.

TOPIC	DATE	REGISTRATION LINK & TIMES
Invest Confidently in Your Future: Learn how to build and manage a long-term investment plan—for all your accounts—that you can feel confident about.	January 7	9 a.m. & 5 p.m.
	January 14	1 p.m.
Organize, Plan and Own Your Future: Designed for women investors, this workshop will show you how to organize your investments and help build a plan to meet your financial goals.	March 11	9 a.m. & 5 p.m.
	March 18	1 p.m.
Maximize Social Security in Your Retirement Strategy: Learn about strategies for claiming your Social Security benefit and how it fits with other income sources to create your retirement paycheck.	May 6	9 a.m. & 5 p.m.
	May 13	1 p.m.
Understanding Roth Contributions in Your Workplace Savings Plan: In this workshop, you'll learn about the Roth contribution option, which is available in your Endeavor Health 401(k) Plan.*	July 8	9 a.m. & 5 p.m.
	July 15	1 p.m.
Prepare for the Reality of Healthcare in Retirement: Learn about the costs of health care in retirement and how you can prepare for them.	September 9	9 a.m. & 5 p.m.
	September 16	1 p.m.
Identify and Prioritize Your Savings Goal: Get strategies and tips on prioritizing and funding your specific savings goals, such as buying a new home or car, saving for a child's college, and more.	November 11	9 a.m. & 5 p.m.
	November 18	1 p.m.

We also invite you to join Patrick Windle, your dedicated Fidelity Workplace Financial Consultant for *Webinar Wednesdays*. Register today!

- **Understanding Roth Contributions in your Workplace Savings Plan:** May 14th 7am & May 28 at 3p.m.
- **What is Roth In-Plan Conversion:** June 11 at 7 a.m. & June 25 at 3 p.m.
- **Retirement Basics:** July 9 at 7 a.m. & July 23 at 3 p.m.

If you are unable to attend, you can access a variety of online workshops on topics like the above, including college planning, budgeting, and retirement. Visit Fidelity's Event Registration System.

Investing involves risk, including risk of loss.

*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.

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