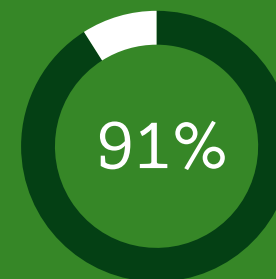




JULY–SEPTEMBER

# Live webinars with Fidelity



of attendees  
feel **CONFIDENT**  
in what to do next<sup>1</sup>

## Packed with financial tips, real-life scenarios, and hands-on resources

- ✓ Pick a topic and time that works for you.
- ✓ Get your questions answered live.
- ✓ Access helpful tools and resources.

### Financial themes include:

-  Money management
-  Saving & investing
-  Retirement planning & transitioning
-  Protection

## Featured event

### How to Begin Investing for Retirement

**60 min.** • Review investing concepts, common asset classes, and different investment approaches for your workplace savings plan.

**July 2:** 6:00 p.m. ET / 5:00 p.m. CT / 3:00 p.m. PT  
**Aug. 4:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT  
**Aug. 21:** 10:00 a.m. ET / 9:00 a.m. CT / 7:00 a.m. PT  
**Sept. 10:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT  
**Sept. 22:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

Register

Live webinars continue on the following pages →

1. Fidelity Workplace Investing, Customer Experience Index Survey, feedback collected in September 2025 from webinar attendees.



JULY-SEPTEMBER

# Live webinars with Fidelity



Click on the  
webinar title  
to register.



## MONEY MANAGEMENT

### A Path to Financial Wellness

**30 min.** • Uncover the essentials of financial wellness to help strengthen your financial foundation and take steps toward a more secure future.

**July 1:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT  
**July 23:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT  
**Aug. 3:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT  
**Aug. 19:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT  
**Sept. 1:** 6:00 p.m. ET / 5:00 p.m. CT / 3:00 p.m. PT  
**Sept. 17:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

## MONEY MANAGEMENT

### Create a Budget and Build Emergency Savings

**30 min.** • Learn the different components of a budget, Fidelity's budgeting guideline, and the importance of emergency savings.

**July 2:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT  
**July 17:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT  
**Aug. 20:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT  
**Aug. 31:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT  
**Sept. 3:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT  
**Sept. 16:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

## MONEY MANAGEMENT

### Strategies that Can Help You Manage Your Money

**60 min.** • Learn different ways to budget, save, and manage debt to help you feel more in control of your money.

**July 7:** 4:00 p.m. ET / 3:00 p.m. CT / 1:00 p.m. PT  
**Aug. 5:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT  
**Aug. 21:** 4:00 p.m. ET / 3:00 p.m. CT / 1:00 p.m. PT  
**Sept. 10:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT  
**Sept. 23:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

## SAVING & INVESTING

### A Woman's Guide to Investing Beyond Retirement

**60 min.** • Designed for women, this workshop will show you how to get started with investing and choose an approach that aligns with your unique goals.

**July 2:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT  
**July 17:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT  
**Aug. 11:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT  
**Aug. 27:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT  
**Sept. 2:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT  
**Sept. 15:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

## SAVING & INVESTING

### Navigating Market Volatility

**60 min.** • This workshop will review what is happening in the markets and why—and help answer your questions.

**July 15:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT  
**July 24:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT  
**Aug. 3:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT  
**Aug. 27:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT  
**Sept. 14:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT  
**Sept. 29:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

## SAVING & INVESTING

### Get Started and Save for the Future You

**60 min.** • Learn the benefits of your workplace savings plan, how to enroll, and small steps you can take to save more.

**July 10:** 10:00 a.m. ET / 9:00 a.m. CT / 7:00 a.m. PT  
**July 27:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT  
**Aug. 20:** 10:00 a.m. ET / 9:00 a.m. CT / 7:00 a.m. PT  
**Aug. 31:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT  
**Sept. 9:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT  
**Sept. 22:** 4:00 p.m. ET / 3:00 p.m. CT / 1:00 p.m. PT

## SAVING & INVESTING

### Quarterly Market Update

**60 min.** • Get the latest update on the markets, including U.S. Equity, International Equity, and Fixed Income markets, as well as macro- and micro-economic updates.

**Aug. 6:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT  
**Aug. 13:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT  
**Aug. 21:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

## SAVING & INVESTING

### Set Goals and Save for What You Want

**30 min.** • Learn how to establish, prioritize, and fund the savings goals that are most important to you.

**July 27:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT  
**Aug. 10:** 6:00 p.m. ET / 5:00 p.m. CT / 3:00 p.m. PT  
**Aug. 25:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT  
**Sept. 8:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT  
**Sept. 23:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

## SAVING & INVESTING

### Your College Savings Options

**60 min.** • Learn about strategies and different options for effectively planning and saving for a child's college education.

**July 1:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT  
**July 9:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT  
**July 28:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT  
**Aug. 6:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT  
**Aug. 21:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT  
**Sept. 3:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT  
**Sept. 29:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT



JULY – SEPTEMBER

# Live webinars with Fidelity



Click on the  
webinar title  
to register.



## RETIREMENT PLANNING & TRANSITIONING

### Fundamentals of Retirement Income Planning

**60 min.** • Learn how the building blocks of an income plan can offset the key risks in retirement, as well as how you can use Fidelity's resources to feel more confident as you prepare to make the move from saving to spending.

**July 9:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

**July 30:** 10:00 a.m. ET / 9:00 a.m. CT / 7:00 a.m. PT

**Aug. 7:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

**Aug. 19:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

**Sept. 4:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

**Sept. 15:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

## RETIREMENT PLANNING & TRANSITIONING

### Preserving Your Savings for Future Generations<sup>2</sup>

**60 min.** • Get a general understanding of what assets are potentially taxable and how they might be distributed. Learn the importance of a living will and health care proxy, as well as the basics of trusts, gifting, and possible insurance replacement strategies.

**July 7:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

**July 17:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

**Aug. 5:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

**Sept. 17:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

**Sept. 29:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

## RETIREMENT PLANNING & TRANSITIONING

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

**60 min.** • Understand the benefits of Social Security and the considerations for deciding when to claim.

**July 13:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

**July 31:** 4:00 p.m. ET / 3:00 p.m. CT / 1:00 p.m. PT

**Aug. 7:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

**Aug. 18:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

**Sept. 2:** 6:00 p.m. ET / 5:00 p.m. CT / 3:00 p.m. PT

**Sept. 30:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

## RETIREMENT PLANNING & TRANSITIONING

### Retirement Basics

**30 min.** • Learn about the power of saving and the different types of accounts you can take advantage of to save for your future.

**July 3:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

**July 30:** 10:00 a.m. ET / 9:00 a.m. CT / 7:00 a.m. PT

**Aug. 4:** 10:00 a.m. ET / 9:00 a.m. CT / 7:00 a.m. PT

**Aug. 20:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

**Sept. 8:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

**Sept. 24:** 4:00 p.m. ET / 3:00 p.m. CT / 1:00 p.m. PT

## PROTECTION

### CyberWellness®: Personal Security Checklist

**60 min.** • Learn about practical recommendations to help protect your accounts, identity, devices, and data.

**Aug. 18:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

## PROTECTION

### Cyber Fraud & Personal Security Insights

**60 min.** • Learn strategies to help you ensure the safety and security of your home, wealth, and family.

**July 13:** 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

**Sept. 14:** 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

2. 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.

Workshop schedule is subject to change. Please check [www.webworkshops.Fidelity.com](http://www.webworkshops.Fidelity.com) to confirm workshop dates and times.

Investing involves risk, including risk of loss.

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