

# CFP® Planning Services

## 2023 Webinar Schedule



MissionSquare Retirement's **CERTIFIED FINANCIAL PLANNER™ professionals** provide clear and personalized guidance to those who serve our communities. Our webinars reinforce our commitment to offering financial wellness tools and resources to help meet participants' education needs as they journey to and, just as importantly, through retirement.

For the schedule of topics and to sign up for webinars, visit [www.missionsq.org/cfpwebinars](http://www.missionsq.org/cfpwebinars).



**All times are Central.**

Presenters, content, dates, and times are subject to change.

### January

Financial Planning Basics: How to Set and Achieve Your Goals January 11 12 p.m.

Effective Estate Planning: Protecting Your Assets for the Future January 18 12 p.m.

Quarterly Economic Overview January 25 12 p.m.

### February

Planning for the Future: The Fundamentals of Retirement Investing February 1 12 p.m.

10 Questions for a Successful Retirement: A Guide for the Retiree February 8 12 p.m.

Navigating the Next Chapter: Preparing for Your Retirement February 15 12 p.m.

Social Security: Understanding Your Retirement Benefit Options February 22 12 p.m.

### March

Maximizing Your Investments: Ensuring Your Retirement is on Track March 1 12 p.m.

The Importance of Long Term Care Planning in Retirement March 8 12 p.m.

Saving for College: Tips and Strategies to Plan Your Child's Future March 15 12 p.m.

How Health Can Affect Wealth in Retirement March 22 12 p.m.

The Medicare Puzzle: Understanding Your Medicare Options March 29 12 p.m.

### April

Retirement 101: A Comprehensive Overview April 5 12 p.m.

Maximizing Your Retirement Through Tax Planning April 12 12 p.m.

Taking Your Estate Planning to the Next Level April 19 12 p.m.

Quarterly Economic Overview April 26 12 p.m.



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**May**

Roth IRA: A Flexible and Tax-Efficient Way to Save for Retirement	May 3	12 p.m.
Retirement Income Planning: Tips to Help Make Your Money Last	May 10	12 p.m.
10 Questions for a Successful Retirement: A Guide for the Retiree	May 17	12 p.m.
An Introduction to Annuities	May 24	12 p.m.
Making the Most of Social Security: Retirement Income Enhancing Strategies	May 31	12 p.m.

**June**

Financial Planning Basics: How to Set and Achieve Your Goals	June 7	12 p.m.
College Funding: Investing in your Child's Future	June 14	12 p.m.
Navigating the Next Chapter: Preparing for Your Retirement	June 21	12 p.m.
The Medicare Puzzle: Understanding Your Medicare Options	June 28	12 p.m.

**July**

Maximizing Your Investments: Ensuring Your Retirement is on Track	July 12	12 p.m.
Effective Estate Planning: Protecting Your Assets for the Future	July 19	12 p.m.
Quarterly Economic Overview	July 26	12 p.m.

**August**

Retirement 101: A Comprehensive Overview	August 2	12 p.m.
Women and Money: Preparing for Future Finances	August 9	12 p.m.
How Health Can Affect Wealth in Retirement	August 16	12 p.m.
Social Security: Understanding your Retirement Benefit Options	August 30	12 p.m.

**September**

Roth IRA: A Flexible and Tax-Efficient Way to Save for Retirement	September 6	12 p.m.
The Importance of Long Term Care Planning in Retirement	September 13	12 p.m.
Retirement Income Planning: Tips to Help Make Your Money Last	September 20	12 p.m.
The Medicare Puzzle: Understanding Your Medicare Options	September 27	12 p.m.

**October**

Making Every Dollar Count: Tips for Smart Spending	October 4	12 p.m.
Maximizing Your Retirement Through Tax Planning	October 11	12 p.m.
Taking Your Estate Planning to the Next Level	October 18	12 p.m.
Quarterly Economic Overview	October 25	12 p.m.

**November**

Financial Planning Basics: How to Set and Achieve Your Goals	November 1	12 p.m.
Navigating the Next Chapter: Preparing for Your Retirement	November 8	12 p.m.
How Health Can Affect Wealth in Retirement	November 15	12 p.m.
Making the Most of Social Security: Retirement Income Enhancing Strategies	November 29	12 p.m.

**December**

Maximizing Your Investments: Ensuring Your Retirement is on Track	December 6	12 p.m.
The Medicare Puzzle: Understanding Your Medicare Options	December 13	12 p.m.



Webinar descriptions are listed on the following pages.

### **An Introduction to Annuities**

Baby Boomers are facing a retirement that may last 30 years or more. But many retirees will need to supplement their retirement income as fewer have access to traditional pension plans they can depend on. See if and how an annuity plays a role in your future.

### **College Funding: Investing in Your Child's Future**

Take a closer look at estimating the costs associated with college and review different college savings options. Learn more about some non-traditional college funding options that you may have overlooked.

### **Effective Estate Planning: Protecting Your Assets for the Future**

An effective estate plan can help ensure your family's financial needs will be taken care of, and that your personal wishes will be carried out in the event of your death.

### **Financial Planning Basics: How to Set and Achieve Your Goals**

Everyone can benefit from a financial plan tailored to individual needs and circumstances. A financial road map can motivate you to save money, help meet your financial goals, and improve your overall financial security now and in the future.

### **How Health can Affect Your Wealth**

An in-depth look into the many different aspects of planning and preparing for unexpected (and expected) healthcare costs in retirement, including Medicare and Long-Term Care considerations.

### **Making Every Dollar Count: Tips for Smart Spending**

Learn how to prioritize so that you spend on what you truly want and can afford.

### **Making the Most of Social Security: Retirement Income Enhancing Strategies**

Understand the basic elements of the Social Security program and focus on strategies that can help make the most of the benefits you receive.

### **Maximizing Your Investments: Ensuring Your Retirement is on Track**

An investing strategy is a carefully planned and prepared approach to managing and accumulating money to help meet your short-term, mid-term, and long-term financial goals. Investment planning requires discipline and patience, but it doesn't have to be difficult.

### **Maximizing Your Retirement Through Tax Planning**

Taxes may be the hidden expense in your retirement plan. Take a closer look at understanding how taxes work, and how to prepare for and manage your tax liabilities in retirement.

### **Navigating the Next Chapter: Preparing for Your Retirement**

If you're retiring soon, you probably have questions about your retirement accounts. Learn what you should consider next.

### **Planning for the Future: The Fundamentals of Retirement Investing**

Whether you're just starting out or need a refresher, we'll discuss basic investing concepts, including risk, asset allocation, diversification, rebalancing, market timing, and dollar-cost averaging.

### **Quarterly Economic Overview**

Gain insight and understanding to how current economic factors and the impact they may have on your retirement planning.

### **Retirement 101: A Comprehensive Overview**

Most of us imagine retirement as a happy time – a reward for a lifetime of hard work, full of possibilities. With Americans living longer, retirement will make up a full third of many people's lives. This makes planning for it essential.

### **Retirement Income Planning: Tips to Help Make Your Money Last**

Understanding how much income you'll need to support the retirement you want, and positioning your assets to provide that income, is important. While there's no one-size-fits-all plan, there are steps you can take to maximize the possibility of a financially secure retirement.

### **Roth IRA: A Flexible and Tax-Efficient Way to Save for Retirement**

Roth IRAs have become popular retirement savings vehicles because if certain conditions are satisfied, distributions are free from federal income taxes. Is a Roth IRA right for you? The answer is complicated and depends on your situation, including whether you believe you'll be in a higher tax bracket in the future.

### **Saving for College: Tips and Strategies**

An overview of why it's important to save for future college costs and ways to accomplish your family's education goals.

### **Social Security: Understanding Your Retirement Options**

As you near retirement, one of the biggest financial decisions to make is when to begin receiving Social Security benefits. With pensions disappearing, Social Security remains the major source of guaranteed lifetime retirement income for most Americans, so it's important to explore your options and make an informed decision.

### **Taking Estate Planning to the Next Level**

Gain a better understanding of the Estate Tax system and if it affects you. Learn ways to consider minimizing estate taxes. Estate Planning: It's not just for the wealthy.

### **The Importance of Long Term Care Planning in Retirement**

According to the federal government, a majority of people over age 65 will need some type of long-term health care, with a significant number of people needing care in a nursing home. Learn how you can plan for this expense.

### **The Medicare Puzzle: Understanding Your Medicare Options**

There are many pieces to the Medicare puzzle you need to be aware of. Gain insight to Medicare and the importance of knowing just when you need to apply.

### **10 Questions for a Successful Retirement: A Guide for the Retiree**

Transitioning into and through retirement can be rewarding and challenging. So having a plan is important. We'll focus on 10 key questions you should ask, from saving, Social Security and Medicare, to managing your investments, withdrawals, and taxes.

### **Women and Money: Preparing for future finances**

More women than ever are responsible for their financial well-being and that of their families. No matter what life stage they're in, they need to know how to save, invest, and plan for the future.