

On Demand Workshop Links

Below please find a list of Fidelity On-Demand Workshops with descriptions and links.

★ Workshops available in Spanish are highlighted in green below their corresponding English descriptions.

A Path to Financial Wellness

Financial wellness isn't just about having enough money-it's about feeling confident and in control. In this workshop, we'll explore 4 key pillars of financial wellness that can help you manage your money today while preparing for tomorrow. You'll leave with knowledge, tools, and resources to help make confident, informed decisions that can support lasting financial security.

PUBLIC LINK <https://www.brainshark.com/fidelityemg/financialwellness>

Build an Emergency Savings Fund

This mini-workshop provides tips to help you prepare for financial emergencies.

PUBLIC LINK https://www.brainshark.com/fidelityemg/rainy_day_fund

Create a Budget

Get help building your budget in this mini-workshop.

PUBLIC LINK https://www.brainshark.com/fidelityemg/understanding_spending

Fundamentals of Retirement Income Planning

This workshop will help you learn why it's important to have a plan for generating income in retirement, factors to consider when transitioning your savings into retirement income, and how to develop a retirement income plan.

PUBLIC LINK <https://www.brainshark.com/fidelityemg/retirementincome>

Get Started and Save for the Future You

This workshop will help you enroll in your 401(k) plan and determine how much to save for retirement.

PUBLIC LINK <https://www.brainshark.com/fidelityemg/getstarted>

Empiece Ahora y Ahorre para Su Futuro

Este taller le ayudará a inscribirse en su plan 401 (k) y determinar cuánto ahorrar para su jubilación..

PUBLIC LINK <https://www.brainshark.com/fidelityemg/EmpieceAhora>

Health Care in Retirement

Get a picture of health care costs in retirement and how to plan for them.

PUBLIC LINK <https://www.brainshark.com/fidelityemg/retirementhealthcare?sn=1>

How to Begin Investing for Retirement

In this workshop, you'll learn some key investing concepts, explore common asset classes, and discuss the importance of asset allocation and diversification. You'll also learn different investment approaches to help you align with your goals, risk tolerance, and timeline when saving for retirement.

PUBLIC LINK <https://www.brainshark.com/fidelityemg/investingforretirement>

Learn the Basics of When and How to Claim Social Security

If Social Security is expected to be your primary source of income in retirement, learn when and how to claim your benefit.

PUBLIC LINK www.brainshark.com/fidelityemg/basicsofSS

Aprenda lo Básico de Cuándo y Cómo Reclamar el Seguro Social

Las personas que utilizarán el Seguro Social como su principal fuente de ingresos en la jubilación..

PUBLIC LINK www.brainshark.com/fidelityemg/AprendaloBasicodeSS

Make the Most of Your Retirement Savings

This workshop will help you understand the importance of saving as much as possible for retirement, how much to save, different account types to save for retirement and ways to preserve and grow your savings to last throughout your lifetime.

PUBLIC LINK <https://www.brainshark.com/fidelityemg/retirementsavings>

Aproveche al Máximo Sus Ahorros de Jubilación

Este taller le ayudará a entender la importancia de ahorrar tanto como sea posible para su jubilación, cuánto ahorrar, diferentes tipos de cuentas para ahorrar para la jubilación y maneras de preservar y hacer crecer sus ahorros para durar toda su vida.

PUBLIC LINK <https://www.brainshark.com/fidelityemg/AprovechealMaximo>

Managing My Money: Budget, Emergency Savings, Debt, and Retirement Basics

This workshop will provide manageable strategies, tools, and tips that can help you take control of your spending, saving, and debt.

PUBLIC LINK <https://www.brainshark.com/fidelityemg/budgetanddebtworkshop>

Administrar Mi Dinero: Presupuesto, Ahorros de Emergencia y Conceptos Básicos de Deuda

Este taller lo educará sobre estrategias, herramientas y consejos para equilibrar el pago de su deuda con el ahorro para sus objetivos futuros.

PUBLIC LINK <https://www.brainshark.com/fidelityemg/CreeunPresupuesto>

Maximize Social Security in Your Retirement Strategy

This workshop will help you understand different Social Security claiming strategies and take the next step to create your retirement income plan.

PUBLIC LINK www.brainshark.com/fidelityemg/maximizesocialsecurity



Navigating Market Volatility

This workshop will review what is happening in the markets and why – and help answer questions such as, “should I move my investments to cash right now?” and, “if I don’t yet have a plan for situations like this, where do I start?”

PUBLIC LINK <https://www.brainshark.com/fidelityemg/NMV03242020>

Cómo Atravesar la Inestabilidad del Mercado

Este taller está diseñado para ayudarlo a manejar mejor la volatilidad del mercado, aprendiendo algunas de las mejores prácticas de inversión que debe seguir y los errores que debe evitar.

PUBLIC LINK <https://www.brainshark.com/fidelityemg/ComoNavegarVolatilidad>

Preserving Your Savings for Future Generations

This workshop will help you learn more about estate planning and preserving your assets.²

PUBLIC LINK <https://www.brainshark.com/fidelityemg/preservingyoursavings>

Retirement Income Planning for Her

Designed for women, this workshop will help you learn about your retirement savings and how to plan for future income.

PUBLIC LINK <https://www.brainshark.com/fidelityemg/retirementplanningforher>

Roth Contributions

This workshop will help you understand Roth contributions in your workplace savings plan.

PUBLIC LINK <http://www.brainshark.com/fidelityemg/roth>

Set Goals and Save for What You Want

Learn about goal setting in relation to financial goals, how to prioritize and manage saving for multiple goals, and review some tips and potential next steps you can take to start saving for some specific goals.

PUBLIC LINK <https://www.brainshark.com/fidelityemg/setgoals>

Take Control of Your Debt

Get help making a plan to manage and pay down your debt in this mini-workshop.

PUBLIC LINK https://www.brainshark.com/fidelityemg/managing_your_debt

Take Your Next Steps During Your Transition

This workshop is intended for those who would be currently going through a job transition and are looking for help with next steps.

For use general use with job transition

PUBLIC LINK <https://www.brainshark.com/fidelityemg/transitionnextsteps>

For use with participants who are being offered an early retirement package

PUBLIC LINK <https://www.brainshark.com/fidelityemg/retirementnextsteps>

Take Your Next Steps During Your Transition – Spanish

Pre-Jubilación: Dé sus Sigüientes Pasos Durante su Transición (For use with participants who are being offered an early retirement package)

Este taller proporciona una visión general de lo que se debe tener en cuenta durante una transición laboral y sus opciones de distribución para sus ahorros en el lugar de trabajo

PUBLIC LINK https://www.brainshark.com/fidelityemg/SigüientesPasos_Pre-Jubilacion

Dé sus Sigüientes Pasos Durante su Transición (For general use with job transition)

Este taller proporciona una visión general de lo que se debe tener en cuenta durante una transición laboral y sus opciones de distribución para sus ahorros en el lugar de trabajo

PUBLIC LINK https://www.brainshark.com/fidelityemg/DeSusSigüientesPasos_GenUse

Understand Plan Loans

This workshop will outline the different ways you can borrow or withdraw money from your workplace savings plan, help you determine if a loan or withdrawal is right for you, and provide strategies for keeping your financial goals on track for the future.

PUBLIC LINK <https://www.brainshark.com/fidelityemg/planloans>

A Woman's Guide to Building a Financial Plan

Designed for women, the workshop will show you how to organize your finances and build a plan to help meet your unique goals.

PUBLIC LINK <https://www.brainshark.com/fidelityemg/guidetobuilding>

A Woman's Guide to Investing

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

PUBLIC LINK <https://www.brainshark.com/fidelityemg/guidetoinvesting>

Your College Saving Options

This workshop will review the various options for funding a college education and strategies to help you effectively plan and save.

PUBLIC LINK <http://www.brainshark.com/fidelityemg/college>

Exploring the Benefits of an HDHP & HSA

This workshop will explain what HSA-eligible Health Plans and HSAs are and how they work together. This content is available to any participant that is eligible for an HSA plan.

PUBLIC LINK <https://www.brainshark.com/fidelityemg/ExploringHDHPandHSABenefits>

Fidelity® Personalized Planning & Advice¹

Learn about Fidelity® Personalized Planning & Advice*, what to expect, and how it works.

PUBLIC LINK <https://www.brainshark.com/fidelityemg/PersonalizedPlanningAdvice>

Get to Know Fidelity and Next Steps to Take Now

This workshop will help you understand how to get the most from your new Fidelity account.

PUBLIC LINK <https://www.brainshark.com/fidelityemg/gettoknowfidelitygeneric>

Conozca a Fidelity y los Próximos Pasos Para Tomar Hoy

Este taller le ayudará a entender cómo sacar el provecho máximo de su nueva cuenta con Fidelity.

PUBLIC LINK <https://www.brainshark.com/fidelityemg/ConozcaFidelity>

Get Ready for the Move to Fidelity

This workshop will help you understand what is happening to your workplace savings plan during the move to Fidelity and what it means for you.

Mapping

PUBLIC LINK <https://www.brainshark.com/fidelityemg/mapping>

Election Window

PUBLIC LINK <https://www.brainshark.com/fidelityemg/electionwindow>

Prepárate para el Movimiento Hacia Fidelity

Este taller le ayudará a entender lo que está sucediendo con su plan de ahorro del trabajo durante el traslado a Fidelity y lo que significa para usted.

PUBLIC LINK <https://www.brainshark.com/fidelityemg/PrepareseparaFidelity>

Medicare Basics: Planning and Enrollment

Learn the basics of Medicare and how to choose the coverage that works for you.

PUBLIC LINK <https://www.brainshark.com/fidelityemg/Medicare>

Understanding Your Nonqualified Deferred Compensation Plan

This workshop will help you understand the potential benefits of your nonqualified deferred compensation plan and factors you should consider before participating.

PUBLIC LINK <https://www.brainshark.com/fidelityemg/UnderstandingNQDC>

¹Fidelity® Personalized Planning & Advice at Work is a service of Strategic Advisers LLC, a registered investment adviser and a Fidelity Investments company, and may be referred to as "Fidelity," "we," or "our" within. For more information, refer to the Terms and Conditions of the Program. When used herein, Fidelity Personalized Planning & Advice refers exclusively to Fidelity Personalized Planning & Advice at Work. **This service provides advisory services for a fee.**

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.

For use for plans with multi-vendor relationships without a NetBenefits® account. Participants with an account can access on-demand workshops by visiting www.Netbenefits.com.

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