



Financial Wellness Seminars for Educators

Because everyone deserves an opportunity to create financial security.

At Security Benefit, we've been helping educators and school districts on their journey to financial security for over five decades. Our informational courses help education professionals face common challenges and seize savings opportunities at every stage of life.



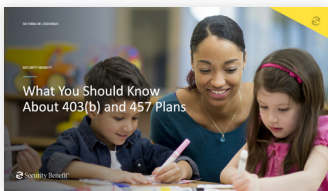
Navigating Your Investment Journey 403(b)

Education professionals will gain confidence in their retirement plan by exploring savings, state pension options, and financial concepts for Early, Mid, and Late Career life stages.



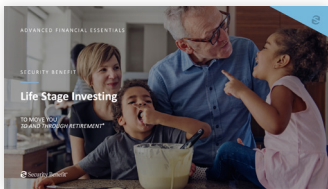
Navigating Your Investment Journey 457

Participants will get a sense of fundamental investment concepts such as pretax and after-tax saving, the value of supplemental saving programs such as 457 plans, and investment strategies for Early, Mid, and Late Career life stages.



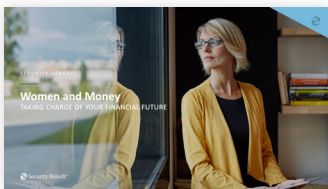
What You Should Know About 403(b) and 457 Plans

Educators deserve the opportunity to make informed decisions about a retirement saving strategy that's right for them. This seminar equips participants with a basic understanding of product types, costs, and saving strategies (Pretax/Roth) often associated with 403(b) and 457 plans. It also introduces participants to LifeStage solutions offered by Security Benefit.



Life Stage Investing

Explore the concept of long-term investing strategies while addressing retirement income sources, gaps, and the potential impact of healthcare on your retirement.



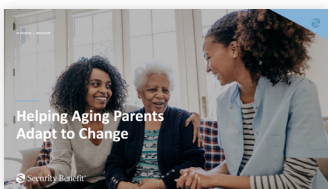
Women and Money

Women face unique financial challenges. This presentation highlights those challenges along with possible solutions to address them.



Retirement Challenges for Women

Understand obstacles to retirement savings while identifying the opportunities unique to women as they save for retirement.



Helping Aging Parents Adapt to Change

Explore several aspects of caring for aging parents and identify issues that can impact their well-being as well as your own.



Social Security Savvy

Social Security was never meant to be the sole source of income during retirement. This presentation will help education professionals create a plan that combines these benefits along with their retirement savings and pension benefits.



How Tax Deferral Can Boost Your Savings Potential

Understanding how and where tax deferral fits into a retirement strategy is key to ensuring investments grow throughout a retirement-planning journey.



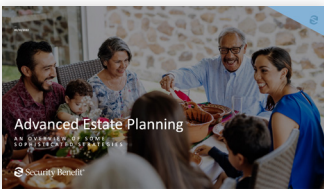
Introduction to Annuities: Funding Your Future

This presentation will help clear up any mysteries surrounding annuities and help education professionals better understand how annuities can provide tax-deferred growth for savings and a stream of income for life.



Estate Planning Basics

The thought of estate planning can be overwhelming. This presentation aims to provide clarity on important estate planning issues and the steps education professionals can take now to protect their estate for their heirs.



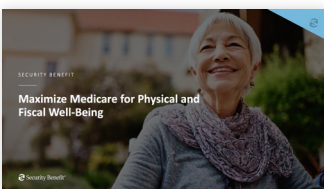
Advanced Estate Planning

For those with a high net worth, this presentation aims to provide sophisticated strategies to keep more of their money with loved ones instead of the federal government.



Specialized Estate Planning

Estate planning can be complicated if an heir is a minor or adult child, sibling, or loved one with disabilities. This presentation covers three common estate planning tools that offer ongoing financial support without compromising other assistance.



Maximize Medicare for Physical and Fiscal Well-Being

For those entering or nearing retirement, understanding how to pay for healthcare is a critical concern. This seminar gives attendees an overview of Medicare, additional care options, and guidance on enrollment.

Help education professionals
build secure financial futures.

To request a presentation of one of our educational seminars for your district, school,
or event contact your financial professional or call us at 800.888.2461

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