New Year New You!
Benefits and Wellness at UT Southwestern Medical Center

Want to take steps to a healthier you? We can help!

Financial Wellness Webinars

AIG

Jan. 12 Noon-1 p.m.	**Retirement Income Strategies** This workshop focuses on new retirement realities and how the essential income planning process can help attendees address the five risks associated with retirement: longevity, health care, inflation, investment, and withdrawal ***Speaker: Roger Garduno, Retirement Plan Consultant II*** Register: aiguc.webex.com/meet/robert.johnston
Jan. 15 Noon-1 p.m.	**Cash Management & Budgeting** This workshop focuses on: • Assessing existing spending habits • Setting financial goals • Creating a written budget • Starting a savings plan ***Speaker: Dana Hodges, Financial Adviser*** Register: aiguc.webex.com/meet/robert.johnston
Jan. 26 Noon-1 p.m.	**How TRS works in Tandem with UT Voluntary Plans** Attendees will learn how TRS works in conjunction with UT Voluntary Plans toward building future financial security and a roadmap to retirement. ***Speaker: Bob Johnston, QPA, FLMI, CLU*** Register: aiguc.webex.com/meet/robert.johnston

Lincoln Financial Group	
Jan. 13 Noon-1 p.m.	**Financial Wellness Matters – The Five Pillars of Financial Health** Learn about the five pillars of financial health and how you can make meaningful change in these areas to increase your overall financial situation. ***Speaker: Ryan Rayburn, registered representative of Lincoln Financial Advisors*** Register: lincolnfinancial.zoom.us/meeting/register/tJEodu2urTkrGtOeUe-oanyvtZkn3puJeriu
Jan. 28 Noon-1 p.m.	**Walkaway Scorecard – Are you on the path to retirement?** Learn more about this creative scorecard that will help you assess if you are ready for retirement in all aspects of your life, not just financial. You will walk away with an assessment and actionable strategies you can use immediately. ***Speaker: Ryan Rayburn, registered representative of Lincoln Financial Advisors*** Register: lincolnfinancial.zoom.us/meeting/register/tJ0vf-GsqDIqHNTGnhzLBttF8sL37_z9Rjb2

TIAA	
Jan. 21 1-2 p.m.	**Quarterly Economic and Market Update** Take a closer look at our views on the financial markets, including key market drivers, U.S. economy, policy and politics, and investing in public markets. This seminar will also cover the challenges that investors face and how to navigate them. **Presenter: Brian Nick** **Audience Registration Link:** event.on24.com/wcc/r/2929212/4BA61835B63B09AE5501423B449DDE7E
Jan. 25 Noon-1 p.m.	**Starting Line** You can learn to evaluate and manage debt, find additional ways to save, create a budget and begin to plan for retirement. **Presenter:** Sean Mossman **Audience Registration Link:** event.on24.com/wcc/r/2929146/A01654A590BD607C1DC063776BC9CF14
Jan. 27 1-2 p.m.	**Demonstrating the Value of Responsible Investing** Make an impact with a social choice. Did you know that responsible investing enables investors to align their social and environmental principals with their financial goals? This seminar will cover the factors that make an investment

	socially responsible, the history of RI and ways for individuals to incorporate RI into their investment strategy. Stay true: Seek competitive returns without compromising your values. What is Environmental, Social, and Governance (ESG) engagement, integration and impact? Learn about our approach to responsible investing. **Presenter:** Cary Parker **Audience Registration Link:** event.on24.com/wcc/r/2929171/8C5BCE63CF1D2F23684AE99311284233

Jan. 14 11 a.m.-Noon	**Be Prepared When Life Happens** We all want to protect ourselves and our families in uncertain times. To be ready for the unexpected and to protect yourself against the unforeseen, a complete plan is essential. Be prepared financially for both the short and long term when life hands you a few surprises. Discover tips, resources, and direction on what you can do now to prepare for the unexpected. **Speaker: Brett Phillips** Register: zoom.us/webinar/register/WN__0UZSh0HTLCNVVEDvcwnsw
Jan. 19 11 a.m.-Noon	**Optimize your savings and tax strategies** What can you do today to improve your current and future financial situation? The sooner you start your plan, the more you can accomplish. Learn how your employer-based voluntary plans can help optimize your savings and tax strategies (now and later). **Speaker: Jim Arrington and Drew Arrington** Register: zoom.us/webinar/register/WN_kzEcqd5aSD69QvLicBQW_Q
Jan. 29 11 a.m.-Noon	**Picture and Achieve your Financial Goals** Think of everything you would ever want to do if you could. Does it seem like it's a dream? Having a sound plan in place will let your dreams come alive. Start your path towards accomplishing all your financial goals today. **Speaker: Shelley Nolasco** Register: zoom.us/webinar/register/WN_7Mv2EOyMQQiVWx0R0Cx6hg

Jan. 7 1-2 p.m.	**<u>Get To Know Your Retirement Plan</u>** See the importance of saving as much as possible • Learn the benefits of saving more • Identify different retirement account types • Explore ways to preserve and grow savings **Speaker: John D. Wells, CFP** Register: fmr.zoom.us/webinar/register/WN_cSXO-iUTTuKfRkv9zbrn_Q
Jan. 11 1-2 p.m.	**<u>Identify and Prioritize Your Savings Goals</u>** Learn how to save for multiple goals • Get next best steps for saving **Speaker: John D. Wells, CFP** Register: fmr.zoom.us/webinar/register/WN_2o6qUFViRqezhpVxgWm93g
Jan. 20 1-2 p.m.	**<u>Learn How To Build a Safety Net</u>** Planning for Emergencies • How much should I have saved for a rainy day? • Explore different ways to prepare **Speaker: John D. Wells, CFP** Register: fmr.zoom.us/webinar/register/WN_T08omd-YQSaks_CTLOdamQ
Jan. 22 1-2 p.m.	**<u>Financial Wellness Check-Up</u>** Am I on track for my savings goals? • Learn how small changes can have a big impact • Identify different ways to save • Explore ways to preserve and grow savings **Speaker: John D Wells, CFP** Register: fmr.zoom.us/webinar/register/WN_Eq_1_I0lTba1uSNL9S21hQ