

# 2024 Financial Academy Calendar



Live & On-Demand Webinars | Digital Resources | Complimentary Online Tools

January	February	March	April	May	June	July
5 Things You Can Do to Become More Tax Efficient This Year	A Guide to Understanding Your Retirement Plan	Protecting Your Legacy Through Proper Estate Planning	Ditch Debt for Good: Learn How to Break the Cycle	Understanding What Your Home & Auto Insurance Covers	How to Invest for Success: A Beginner's Guide	I'm A Financial Planner, Ask Me Anything!

## Planning to Retire Summer Series

August		September		October	November	December
Understanding Your Social Security Benefits	Medicare Made Easy	Creating A Reliable Retirement Income Stream	The Emotions of Retirement	Decoding Your Employee Benefits	Tips and Tricks for Raising Money-Smart Kids	Market Outlook for 2025

Scan or click the QR code to register for our 2024 webinars!



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## UPCOMING WEBINARS



**Mike Neaton**

Wealth Management Adviser  
OneDigital | Retirement + Wealth

### 5 Things You Can Do to Become More Tax Efficient This Year

**Jan. 9 – 3 p.m. EST**

Discover five key strategies that you can implement to optimize your 2024 tax planning. In this session, we will share valuable insights to help you prepare for the upcoming tax year.



**Laura Cali**

Wealth Management Adviser  
OneDigital | Retirement + Wealth

### A Guide to Understanding Your Retirement Plan

**Feb. 13 – 3 p.m. EST**

Join us as we delve into the intricacies of your workplace retirement plan and equip you with the essential knowledge you need to secure your financial future. Here we'll discuss the basics of retirement accounts, how much you can save, and options to help you gain a deeper understanding of your retirement plan.



**Brad Towson**

Vice President of Wealth Management  
OneDigital | Retirement + Wealth

### Protecting Your Legacy Through Proper Estate Planning

**Mar. 19 – 3 p.m. EST**

Are you ready to safeguard your legacy through strategic estate planning? In this informative session, we will share helpful tips on how to create a comprehensive estate plan tailored to your unique needs and goals. You'll learn about essential estate planning tools, including wills, trusts, and power of attorney. Plus, you'll understand how to protect your assets and ensure a smooth transfer to your loved ones.



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