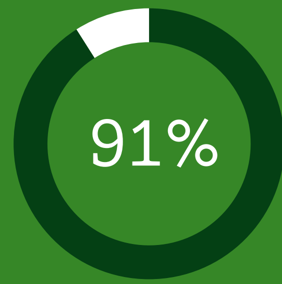
JULY–SEPTEMBER

Live webinars with Fidelity



of attendees feel **CONFIDENT** in what to do next[1]

Financial themes include:

- Money management
- Saving & investing
- Retirement planning & transitioning
- Protection

Packed with financial tips, real-life scenarios, and hands-on resources

- ✓ Pick a topic and time that works for you.
- ✓ Get your questions answered live.
- ✓ Access helpful tools and resources.

Featured event

How to Begin Investing for Retirement

60 min. • Review investing concepts, common asset classes, and different investment approaches for your workplace savings plan.

July 2: 6:00 p.m. ET / 5:00 p.m. CT / 3:00 p.m. PT
Aug. 4: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT
Aug. 21: 10:00 a.m. ET / 9:00 a.m. CT / 7:00 a.m. PT
Sept. 10: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT
Sept. 22: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

Register

Live webinars continue on the following pages →

1. Fidelity Workplace Investing, Customer Experience Index Survey, feedback collected in September 2025 from webinar attendees.

Fidelity INVESTMENTS

JULY–SEPTEMBER

Live webinars with Fidelity

Click on the webinar title to register.

MONEY MANAGEMENT

A Path to Financial Wellness

30 min. • Uncover the essentials of financial wellness to help strengthen your financial foundation and take steps toward a more secure future.

July 1: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

July 23: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

Aug. 3: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

Aug. 19: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

Sept. 1: 6:00 p.m. ET / 5:00 p.m. CT / 3:00 p.m. PT

Sept. 17: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

MONEY MANAGEMENT

Create a Budget and Build Emergency Savings

30 min. • Learn the different components of a budget, Fidelity's budgeting guideline, and the importance of emergency savings.

July 2: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

July 17: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

Aug. 20: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

Aug. 31: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

Sept. 3: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

Sept. 16: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

MONEY MANAGEMENT

Strategies that Can Help You Manage Your Money

60 min. • Learn different ways to budget, save, and manage debt to help you feel more in control of your money.

July 7: 4:00 p.m. ET / 3:00 p.m. CT / 1:00 p.m. PT

Aug. 5: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

Aug. 21: 4:00 p.m. ET / 3:00 p.m. CT / 1:00 p.m. PT

Sept. 10: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

Sept. 23: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

SAVING & INVESTING

A Woman's Guide to Investing Beyond Retirement

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

July 2: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

July 17: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

Aug. 11: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

Aug. 27: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

Sept. 2: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

Sept. 15: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

SAVING & INVESTING

Navigating Market Volatility

60 min. • This workshop will review what is happening in the markets and why—and help answer your questions.

July 15: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

July 24: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

Aug. 3: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

Aug. 27: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

Sept. 14: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

Sept. 29: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

SAVING & INVESTING

Get Started and Save for the Future You

60 min. • Learn the benefits of your workplace savings plan, how to enroll, and small steps you can take to save more.

July 10: 10:00 a.m. ET / 9:00 a.m. CT / 7:00 a.m. PT

July 27: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

Aug. 20: 10:00 a.m. ET / 9:00 a.m. CT / 7:00 a.m. PT

Aug. 31: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

Sept. 9: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

Sept. 22: 4:00 p.m. ET / 3:00 p.m. CT / 1:00 p.m. PT

SAVING & INVESTING

Quarterly Market Update

60 min. • Get the latest update on the markets, including U.S. Equity, International Equity, and Fixed Income markets, as well as macro- and micro-economic updates.

Aug. 6: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

Aug. 13: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

Aug. 21: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

SAVING & INVESTING

Set Goals and Save for What You Want

30 min. • Learn how to establish, prioritize, and fund the savings goals that are most important to you.

July 27: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

Aug. 10: 6:00 p.m. ET / 5:00 p.m. CT / 3:00 p.m. PT

Aug. 25: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

Sept. 8: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

Sept. 23: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

SAVING & INVESTING

Your College Savings Options

60 min. • Learn about strategies and different options for effectively planning and saving for a child's college education.

July 1: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

July 9: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

July 28: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

Aug. 6: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

Aug. 21: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

Sept. 3: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

Sept. 29: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

More webinars on the next page →

Fidelity INVESTMENTS

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Click on the webinar title to register.

RETIREMENT PLANNING & TRANSITIONING

Fundamentals of Retirement Income Planning

60 min. • Learn how the building blocks of an income plan can offset the key risks in retirement, as well as how you can use Fidelity's resources to feel more confident as you prepare to make the move from saving to spending.

July 9: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT
July 30: 10:00 a.m. ET / 9:00 a.m. CT / 7:00 a.m. PT
Aug. 7: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT
Aug. 19: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT
Sept. 4: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT
Sept. 15: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

RETIREMENT PLANNING & TRANSITIONING

Preserving Your Savings for Future Generations[2]

60 min. • Get a general understanding of what assets are potentially taxable and how they might be distributed. Learn the importance of a living will and health care proxy, as well as the basics of trusts, gifting, and possible insurance replacement strategies.

July 7: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT
July 17: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT
Aug. 5: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT
Sept. 17: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT
Sept. 29: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT

RETIREMENT PLANNING & TRANSITIONING

Learn the Basics of When and How to Claim Social Security

60 min. • Understand the benefits of Social Security and the considerations for deciding when to claim.

July 13: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT
July 31: 4:00 p.m. ET / 3:00 p.m. CT / 1:00 p.m. PT
Aug. 7: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT
Aug. 18: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT
Sept. 2: 6:00 p.m. ET / 5:00 p.m. CT / 3:00 p.m. PT
Sept. 30: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

RETIREMENT PLANNING & TRANSITIONING

Retirement Basics

30 min. • Learn about the power of saving and the different types of accounts you can take advantage of to save for your future.

July 3: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT
July 30: 10:00 a.m. ET / 9:00 a.m. CT / 7:00 a.m. PT
Aug. 4: 10:00 a.m. ET / 9:00 a.m. CT / 7:00 a.m. PT
Aug. 20: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT
Sept. 8: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT
Sept. 24: 4:00 p.m. ET / 3:00 p.m. CT / 1:00 p.m. PT

PROTECTION

CyberWellness®: Personal Security Checklist

60 min. • Learn about practical recommendations to help protect your accounts, identity, devices, and data.

Aug. 18: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

PROTECTION

Cyber Fraud & Personal Security Insights

60 min. • Learn strategies to help you ensure the safety and security of your home, wealth, and family.

July 13: 2:00 p.m. ET / 1:00 p.m. CT / 11:00 a.m. PT
Sept. 14: 12:00 p.m. ET / 11:00 a.m. CT / 9:00 a.m. PT

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.

Workshop schedule is subject to change. Please check www.webworkshops.Fidelity.com to confirm workshop dates and times.

Investing involves risk, including risk of loss.

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