2026 Financial Education Virtual Series

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January

New Goals For the New Year – Creating a Roadmap For 2026

Kick off 2026 with A clear financial plan as we walk through practical steps for setting meaningful goals and building a strategy to achieve them.

February

Insurance and Risk Management Essentials

Discover how to assess your risks and develop an understanding of various insurance tools in order to reduce financial vulnerability and strengthen your overall plan.

March

Smart Tax Moves – Maximizing Efficiency Before You File

Get ahead of tax season with tips to optimize deductions, credits, and overall tax efficiency before you submit your return.

April

Spring Cleaning Your Finances

Clear out financial clutter with a guided review of your budget, accounts, and goals to help you move into the rest of the year with confidence.

May

Homebuying 101 – The Hidden Costs of Homeownership

Understand the full financial picture of homeownership, including the hidden and long-term costs, to better prepare for buying a home.

June

Estate Planning: Protecting Your Legacy

Learn the key components of estate planning to help protect your assets, honor your wishes, and preserve your legacy for the people who matter most.

July

Election Year Economics – How Policy Changes Can Impact Your Finances

Gain insight into how shifting policies during an election year can affect markets, taxes, and your financial plan.

August

Navigating Healthcare Costs Before Retirement

Explore strategies on how to navigate medical expenses, insurance options, and long-term care planning so you can retire confidently.

September

Financial Planning For Growing Families & Future Education Costs

Learn the key components of estate planning to help protect your assets, honor your wishes, and preserve your legacy for the people who matter most.

October

Income For Life – Understanding Guaranteed Income Sources

Learn how guaranteed income sources work and how they can help create steady, reliable income throughout retirement.

November

Giving Strategically – Charitable and Legacy Planning Tips

Uncover tax-efficient giving strategies and long-term planning techniques to build a legacy that reflects your values.

December

Smart Holiday Spending and Year-end Checklist

Get actionable guidance on managing holiday expenses and wrapping up important financial to-dos before year-end.

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