

Employee Banking and Investing Program

Bank of America and Merrill offer education on a broad number of topics, and one channel for delivery is through educational workshops. The presentations are designed to give your employees actionable steps so they can make informed financial decisions to help improve their financial lives. Choose one session or build a workshop series to meet a range of employee needs.

EMPLOYEE BENEFIT WEBINAR



The Banking and Investing Program

Learn more about the new benefits being offered to employees, including special access to enroll in Bank of America Preferred Rewards with Gold tier benefits.¹

FINANCIAL WELLNESS WEBINARS



Finances: What I wish I knew yesterday

Learn more about how to set goals, create a budget, manage debt and credit, build an emergency fund and plan for your future.

Financial wellness for changing times

Information and guidance to help navigate these changing times, including how to create a spending plan, prioritize saving, possible cash flow sources and resources available to you.

Financial matters for women

An overview of the unique financial challenges that women may face and strategies and tips to help improve their financial well-being.

Keys to homeownership: What you need to know

Reviews getting ready for homeownership, what you need to buy a home, mortgage basics, finding a new home, and additional resources.

Financial wellness for the holidays

Learn how to manage your finances during the holidays and how to prepare for the New Year.



Financial tips for your 20s and 30s

Guidance for managing day-to-day expenses, building an emergency fund, renting versus buying, credit, managing debt and planning for your future.

Financial tips for your 30s and 40s

Offers financial tips on how to prioritize your goals, homeownership, preparing for changing priorities and planning for retirement.

Financial tips for your 50s and 60s from Merrill

Learn about saving for retirement and doing a portfolio checkup, managing cash flow today and tomorrow, your possible sources of income and withdrawing what you've accumulated.

Education planning

Reviews various options available to help you plan and save for educational expenses.

Raising financial savvy children

Learn helpful tips to teach your child about earning, saving, spending, giving, and investing to set them up for long-term success with managing money.



Retire on your terms

This seminar reviews strategies to help you estimate your retirement expenses and identify your possible retirement income sources — plus ideas on how to get on track for retirement.

Financial strategies for caregivers

A discussion on the financial impacts of becoming a caregiver and what you can do now to plan ahead.

Health care costs in retirement: A closer look at Medicare

Learn about health care costs, Medicare and long-term care.

Understanding Social Security: When, What, How

Exploring the basics of Social Security and strategies for maximizing benefits.

Investing with Merrill: Put your money to work for you

An introduction to the world of investing, discussing why you should invest, your investment choices, key factors to consider and how to manage your investments.

Investment products offered through Merrill Lynch, Pierce, Fenner & Smith Incorporated:

Are Not FDIC Insured	Are Not Bank Guaranteed	May Lose Value
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Please see important information on the back.

