On Demand Workshop Links

Below please find a list of Fidelity On-Demand Workshops with descriptions and links.

★ Workshops available in Spanish are highlighted in green below their corresponding English descriptions.

Build an Emergency Savings Fund

This mini-workshop provides tips to help you prepare for financial emergencies.

PUBLIC LINK https://www.brainshark.com/fidelityemg/rainy_day_fund

Create a Budget you Will Actually Use

Planning out your spending, and living within a budget, is all about freedom. Learn how to create a budget you'll use, so you're prepared for the unexpected, and able to pursue what's important to you.

PUBLIC LINK https://www.brainshark.com/fidelityemg/understanding_spending

Five Money Musts

Learn about five basic money concepts to help you start your financial journey on the right foot.

PUBLIC LINK www.brainshark.com/fidelityemg/fivemoneymusts

Fundamentals of Retirement Income Planning

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.

PUBLIC LINK https://www.brainshark.com/fidelityemg/retirementincome

Get a Handle on Your Current Student Loan Debt

Learn and understand the wide range of student loan repayment options. Use Fidelity's student debt resources and tools to evaluate your current loan situation and determine next steps for tackling your student debt.

PUBLIC LINK www.brainshark.com/fidelityemg/studentdebt

Get Started and Save for the Future You

Everyone needs a path to financial wellness, and it can start with your workplace savings plan. Learn about the investment options and how to contribute so you start saving for your future.

PUBLIC LINK https://www.brainshark.com/fidelityemg/getstarted

Empiece Ahora y Ahorre para Su Futuro

Este taller le ayudará a inscribirse en su plan 401 (k) y determinar cuánto ahorrar para su jubilación..

PUBLIC LINK https://www.brainshark.com/fidelityemg/EmpieceAhora

Identify and Prioritize Your Savings Goals

We're all trying to save for something—like an emergency, car, home, or retirement. Learn how to commit to your financial goals so you can create a plan to help you reach them.

PUBLIC LINK www.brainshark.com/fidelityemg/savingsgoals

Identifique y priorice sus metas de ahorro

Si quiere ahorrar para lograr varias metas: Obtenga estrategias y consejos para priorizar y financiar sus metas específicas de ahorro, como comprar una casa o un automóvil nuevo, ahorrar para la universidad de sus hijos y más.

PUBLIC LINK https://www.brainshark.com/fidelityemg/IdentifiqueyPriorice

Invest Confidently for Your Future

Saving for your goals is great but investing your savings - properly and with a plan - can really help your money grow. Learn how to build an investment plan to help you optimize your savings.

PUBLIC LINK https://www.brainshark.com/fidelityemg/investconfidently

Learn the Basics of When and How to Claim Social Security

There's a lot to consider when deciding when to take Social Security benefits. Understand the key claiming ages and how your benefit is calculated, so you can feel confident about your decision

PUBLIC LINK www.brainshark.com/fidelityemg/basicsofSS

Aprenda lo básico de cuándo y cómo reclamar el Seguro Social

Si considera que el Seguro Social será su principal fuente de ingresos durante su jubilación, entérese de cuándo y cómo reclamar su beneficio.

PUBLIC LINK www.brainshark.com/fidelityemg/AprendaloBasicodeSS

Make the Most of Your Retirement Savings

How much saving is "enough" for retirement? Learn strategies that can help you save more today and tips for preserving and growing your savings in retirement.

PUBLIC LINK https://www.brainshark.com/fidelityemg/retirementsavings

Aproveche al máximo sus ahorros de jubilación

Si quiere ahorrar más para la jubilación: Aprenda a maximizar sus ahorros para la jubilación, las formas de ahorrar para la jubilación más allá de su plan de ahorros laborales y los pasos que puede dar hoy para prepararse para la jubilación.

PUBLIC LINK https://www.brainshark.com/fidelityemg/AprovechealMaximo

Managing My Money: Budget, Emergency Savings, Debt, and Retirement Basics

Identify the three core components of a sound budget. Understand how to begin to build (or rebuild) your emergency savings fund and get control over prioritizing your debt.

PUBLIC LINK https://www.brainshark.com/fidelityemg/budgetanddebtworkshop

Administrar Mi Dinero: Presupuesto, Ahorros de Emergencia y Conceptos Básicos de Deuda

Este taller le proporcionará estrategias, herramientas y consejos prácticos que lo ayudarán a tomar el control de sus gastos, ahorros y deudas.

PUBLIC LINK https://www.brainshark.com/fidelityemg/CreeunPresupuesto

Manage Unexpected Events and Expenses

Learn how to assess spending and take control of your budget. Consider reasons for taking money from a workplace savings plan and understand ways that Fidelity may help.

PUBLIC LINK	https://www.brainshark.com/fidelityemg/ManagingtheUnexpected42020

Maximize Social Security in Your Retirement Strategy

Understand how Social Security fits into your overall retirement income plan, when to start claiming your benefit, and how it contributes to your overall retirement paycheck.

PUBLIC LINK	www.brainshark.com/fidelityemg/maximizesocialsecurity

Navigating Market Volatility

Consider if you should change your investments and understand how to pull money out of the market. Learn the effects of moving to cash and why you may consider saving more in your workplace savings plan.

PUBLIC LINK	https://www.brainshark.com/fidelityemg/NMV03242020

Cómo Atravesar la Inestabilidad del Mercado

Considere si debe cambiar sus inversiones y entienda como sacar dinero del mercado. Aprenda los efectos de cambiar al efectivo y porque debería considerar ahorrar mas en su plan de ahorros en el lugar de trabajo.

PUBLIC LINK	https://www.brainshark.com/fidelityemg/ComoNavegarVolatilidad

Preserving Your Savings for Future Generations*

Learn about the basics of estate planning and get a general understanding of what assets are potentially taxable and how they might be distributed. Discover the importance of a living will and health care proxy, and the basics of trusts, gifting, and possible insurance replacement strategies.

PUBLIC LINK	https://www.brainshark.com/fidelityemg/preservingyoursavings

Prepare for the Reality of Health Care in Retirement

Healthcare costs in retirement can affect your savings and lifestyle. Explore how to prepare for the reality of healthcare costs in retirement.

PUBLIC LINK	https://www.brainshark.com/fidelityemg/retirementhealthcare?sn=1

Retirement Income Planning for Her

What does your retirement look like? Uncover the five key financial risks in retirement and why planning is different for women so you can be prepared for the future you envision.

PUBLIC LINK	https://www.brainshark.com/fidelityemg/retirementplanningforher

Roth Contributions

This workshop will help you understand the potential benefits of having Roth contributions as part of your workplace savings plan. It will cover the differences between Roth and traditional pretax contributions as well as Roth contributions to your plan vs. contributions to a Roth IRA. Learn more to find out whether Roth contributions are a good fit for your plan.

PUBLIC LINK	http://www.brainshark.com/fidelityemg/roth

Take Control of Your Debt

Would you like to get a handle on your debt, once and for all? Discover real strategies to help you prioritize what to payoff first and tips for managing your spending.

PUBLIC LINK	https://www.brainshark.com/fidelityemg/managing_your_debt

Take the First Step to Investing

Firm up your understanding of investing basics like common investment types, asset allocation, and diversification so you can discover the investment approach that's right for you.

PUBLIC LINK https://www.brainshark.com/fidelityemg/startinvesting

Dé el Primer Paso Hacia la Inversion

Si quiere entender cómo comenzar a invertir: Conozca los conceptos clave de inversión, tipos de inversión comunes y cómo elegir su enfoque de inversión.

PUBLIC LINK https://www.brainshark.com/fidelityemg/Deelprimerpaso

Take Your Next Steps During Your Transition

This workshop is intended for those who would are currently going through a job transition and are looking for help with next steps.

For use general use with job transition

PUBLIC LINK https://www.brainshark.com/fidelityemg/transitionnextsteps

For use with participants who are being offered an early retirement package

PUBLIC LINK https://www.brainshark.com/fidelityemg/retirementnextsteps

Understand Plan Loans

This workshop will outline the different ways you can borrow or withdraw money from your workplace savings plan, help you determine if a loan or withdrawal is right for you, and provide strategies for keeping your financial goals on track for the future.

PUBLIC LINK https://www.brainshark.com/fidelityemg/planloans

A Woman's Guide to Building a Financial Plan

Designed for women, the workshop will show you how to organize your finances and build a plan to help meet your unique goals.

PUBLIC LINK https://www.brainshark.com/fidelityemg/guidetobuilding

A Woman's Guide to Investing

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

PUBLIC LINK https://www.brainshark.com/fidelityemg/guidetoinvesting

Your College Saving Options

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

PUBLIC LINK http://www.brainshark.com/fidelityemg/college

Discover the Potential of Your HSA

Understand the benefits of saving and investing money in a Health Savings Account to help you prepare for medical expenses now and in retirement.

PUBLIC LINK www.brainshark.com/fidelityemg/DiscoverHSA

Exploring the Benefits of an HDHP & HSA

Dive into the features of an HSA-eligible health plan and Health Savings Account to understand how to put them to work for you and your family.

PUBLIC LINK https://www.brainshark.com/fidelityemg/ExploringHDHPandHSABenefits

Fidelity® Personalized Planning & Advice[1]

Learn about the Fidelity Personalized Planning & Advice service and how it may assist you in meeting your retirement goals.

PUBLIC LINK https://www.brainshark.com/fidelityemg/PersonalizedPlanningAdvice

Get to Know Fidelity and Next Steps to Take Now

Learn about your plan's move to Fidelity and how to get the most out of your new account.

PUBLIC LINK https://www.brainshark.com/fidelityemg/gettoknowfidelitygeneric

Conozca a Fidelity y los Próximos Pasos Para Tomar Hoy

Si le gustaría obtener más información acerca de su nueva cuenta Fidelity: Obtenga información sobre el cambio de su plan hacia Fidelity y cómo sacar el máximo provecho de su nueva cuenta.

PUBLIC LINK https://www.brainshark.com/fidelityemg/ConozcaFidelity

Get Ready for the Move to Fidelity

Learn about changes to your workplace savings plan and what that means for you.

Mapping

PUBLIC LINK https://www.brainshark.com/fidelityemg/mapping

Election

PUBLIC LINK https://www.brainshark.com/fidelityemg/electionwindow

Prepárese para el Movimiento Hacia Fidelity

Aprenda sobre los cambies en su plan de ahorro en el lugar de trabajo y lo que significa para usted

PUBLIC LINK https://www.brainshark.com/fidelityemg/PrepareseparaFidelity

Understanding Your Nonqualified Deferred Compensation Plan

Learn how a non-qualified retirement plan can help you save for your retirement.

PUBLIC LINK https://www.brainshark.com/fidelityemg/UnderstandingNQDC

[1] Fidelity® Personalized Planning & Advice at Work is a service of Fidelity Personal and Workplace Advisors LLC and Strategic Advisers LLC. Both are registered investment advisers, are Fidelity Investments companies and may be referred to as "Fidelity," "we," or "our" within. For more information, refer to the Terms and Conditions of the Program. When used herein, Fidelity Personalized Planning & Advice refers exclusively to Fidelity Personalized Planning & Advice at Work. **This service provides advisory services for a fee.**

Effective March 31, 2025, Fidelity Personal and Workplace Advisors LLC (FPWA) will merge into Strategic Advisers LLC (Strategic Advisers). Any services provided by FPWA as described above will, as of March 31, 2025, be provided by Strategic Advisers. FPWA and Strategic Advisers are Fidelity Investments companies.

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.

For use for plans with multi-vendor relationships without a NetBenefits® account. Participants with an account can access on-demand workshops by visiting www.Netbenefits.com.

Fidelity Brokerage Services LLC, Member NYSE, SIPC, 900 Salem Street, Smithfield, RI 02917
778454.9.0