

# Financial Well-Being and Beyond

JULY 2023



**Green**  
Financial Well-Being Topic



**Purple**  
Emotional Well-Being Topic



**Orange**  
Life and Family Care Topic

MONDAY	TUESDAY	WEDNESDAY	THURSDAY
<p><b>529 College Savings Plan</b> 10 The Education Plan 10:30 – 11:30am PT / 11:30am – 12:30pm MT</p> <p><b>Creating Generational Wealth</b> Prudential 12:30 – 1:30pm PT / 1:30 – 2:30pm MT</p>	<p><b>How to Better Manage Stress</b> 11 Optum 11am – Noon PT / Noon – 1pm MT</p> <p><b>Monthly Retirement Briefing</b> Sandia HR Solutions 1 – 2:30pm PT / 2 – 3:30pm MT</p>	<p><b>Fundamentals of Wills, Trusts and Power of Attorney</b> 12 Prudential 9:30 – 10:30am PT / 10:30 – 11:30am MT</p> <p><b>Neuroscience Hacks</b> Blue Cross Blue Shield of New Mexico 11:30am – 12:30pm PT / 12:30 – 1:30pm MT</p>	<p>13</p>
<p><b>Basics of Personal Finance</b> 17 Sandia Laboratory Federal Credit Union 11am – Noon PT / Noon – 1pm MT</p> <p><b>Maximizing Financial Health, Minimizing Financial Stress</b> Edelman Financial Engines 12:30 – 1:30pm PT / 1:30 – 2:30pm MT</p>	<p><b>Get Ahead for Your Future Self</b> 18 Edelman Financial Engines 12:30 – 1:30pm PT / 1:30 – 2:30pm MT</p>	<p><b>Doc Chat – Financial Health</b> 19 Sandia Employee Health Services 11am – Noon PT / Noon – 1pm MT</p> <p><b>Advanced Estate Planning Strategies</b> Prudential 12:30 – 1:30pm PT / 1:30 – 2:30pm MT</p>	<p><b>Resources for Putting Family First</b> 20 Sandia Resources 9:30 – 10:30am PT / 10:30 – 11:30am MT</p>
<p><b>Health Savings Account (HSA) Basics</b> 24 Optum 9:30 – 10:30am PT / 10:30 – 11:30am MT</p> <p><b>Social Security: With You through Life's Journey</b> Social Security Administration 11am – Noon PT / Noon – 1pm MT</p>	<p><b>How to Care for Yourself while also Caring for Others</b> 25 Wellthy 9 – 10am PT / 10 – 11am MT</p> <p><b>ONSITE: Steve Schiff Auditorium/ Virtual Tax Efficient Savings through Roth In-Plan Conversions</b> Fidelity Investments 2 – 3pm PT / 3 – 4pm MT</p>	<p><b>ONSITE: Steve Schiff Auditorium/ Virtual Fundamentals of Retirement Income Planning</b> 26 Fidelity Investments 1 – 2pm PT / 2 – 3pm MT</p>	<p><b>ONSITE: Steve Schiff Auditorium/ Virtual - Invest Confidently for Your Future</b> 27 Fidelity Investments 7:30 – 8:30am PT / 8:30 – 9:30am MT</p> <p><b>ONSITE: Steve Schiff Auditorium/ Virtual - Managing My Money</b> Fidelity Investments 9 – 10am PT / 10 – 11am MT</p> <p><b>ONSITE: Steve Schiff Auditorium/ Virtual - Maximize Social Security in Your Retirement Strategy</b> Fidelity Investments 10:30 – 11:30am PT / 11:30am – 12:30pm MT</p>