

Financial Well-Being and Beyond

JULY 2023



Sandia
National
Laboratories



Green

Financial Well-Being Topic



Purple

Emotional Well-Being Topic



Orange

Life and Family Care Topic

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