

# 2025 EMPLOYEE ENGAGEMENT & FINANCIAL WELLBEING CALENDAR

Transform your employees' financial wellbeing and enhance their engagement in the workplace with SOFA's curated benefits content. Our monthly workshops are tailored to meet your workforce's needs and delivered live on-site at your workplace. All workshops are 60 minutes long and designed to empower your employees to achieve financial freedom. In addition, our new "Lunch and Learn" workshops are 90 minutes long and can be held either on-site or at our SOFA Training Center. To schedule a workshop today, please contact our expert SOFA speaker, Marie Ostlund.

## JANUARY

### Exploring Your Options for a Quality Retirement

January's focus is on looking at financial personalities, high cost of debt, planning for retirement and income streams.

## FEBRUARY

### Investment Basics for Women

February's focus is on Different Types of Investments, Understanding Risk & Return and planning for retirement.

## MARCH

### Investment Concerns in a Fragile Market

March's focus is on Reviewing Common Investor Scenarios, new Facts to know when Investing in a Stock Market Decline.

## APRIL

### Financial Literacy Month

*Getting Fiscally Fit* is about overcoming and understanding Financial Challenges, creating an Emergency Fund, Credit and Budgeting.

## MAY

### Understanding 401K/403B/457 Rollovers

May's focus will explore the Pros' and Con's on taking the Money, Asset Allocation and income needs.

## JUNE

### Women Approaching Retirement and Beyond

June is about understanding Women and Money, Divorce and Widowhood, Retirement and Estate Planning.

## JULY

### Preparing for Long Term Care

What is Long Term Care, and Will You Need it? Understanding Your Options. How Much Will it Cost? What Will Medicare Cover?

## AUG

### Strategies for a Sustainable Income in Retirement

Preparation for a Successful Retirement. The Average Cost of Long Term Care and Life Expectancy. Discussing Investment, Risks and Interest Rates.

## SEPTEMBER

### Estate Planning

Distribution of Estate, Wills and Trusts, Specific Estate Planning Strategies, The Purpose of Estate Planning, What is Probate and why should you avoid it.

## OCTOBER

### Social Security Explained

What is Social Security? Who is Eligible and at what age? What is a Defined Benefit Plan and who contributes? What are the different types of Annuities?

## NOVEMBER

### Preparing For Retirement After the Corona Virus

Important Questions to Consider After the Corona Virus. Retirement Income – The Sources. Factors Affecting Portfolio Results Before and After Retirement. Impacts to Planning for the Future

## DECEMBER

### Stress and Your Health

What is Stress? Overview of some Stress Statistics. Financial Stress and How to Overcome it. What you can do to Manage your Stress.