2025 Education Curriculum

January
- How Taxation Works

February
- Paying for College: Managing Student Loans & Saving for the Next Generation

March
- How Social Security and Medicare Work

April
- Investing 101: Tips for Beginning Investors
- Investing 201: Tips for Experienced Investors

May
- Home Buying Essentials

June
- Insurance Basics: Home, Health, Life and Long-Term Care

July
- Money Management: Which Accounts, When and for What?

August
- Managing a Budget & Controlling Debt

September
- Workplace Health Insurance & the Value of HSAs

October
- Saving & Investing for People with Unique Needs

November
- How to Know if You Are Retirement Ready

December
- Why Estate Planning is an Essential Part of Your Financial Plan

- Live webinars. Pre-recorded sessions will be made available after the live webinars.
  This webinar schedule is tentative. Topics, dates and times will be promoted via email communication.

More Ways to Learn

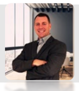
Rethink Your Money™ Radio Show & Podcast:

Hear the most up-to-date information and freshest thinking on investing, taxes, estate planning and many other areas that impact your financial life.

Creative Planning Insights

Read articles and watch videos on financial planning, investing, tax strategies, estate planning and trusts, insurance, retirement, and other financial topics.

One-to-One Financial Coaching



Your designated Financial Wellness Consultant, Bryan Spencer has more than 20 years of experience helping individuals improve their financial health.

Click the QR code to schedule