Financial Wellness Workshop Replay

PWA Financial is excited to provide replays of our financial wellness workshop series. The workshop replays are available to all retirement plan participants and provide a great opportunity for learning and post-workshop engagement. Check out the links below to access replays of our workshops.

Understanding Life Insurance

- ✓ Life insurance options/benefits
- ✓ Term Insurance vs. Permanent Insurance
- ✓ Common uses for life insurance
- ✓ How much life insurance do I need?
- ✓ What types of life insurance should I buy?

WATCH REPLAY

Social Security Planning

- ✓ Will Social Security be there for me?
- ✓ How much money can I expect to receive?
- ✓ When should I apply for Social Security?
- ✓ How can I maximize my benefits?
- ✓ Will Social Security be enough to live on?

WATCH REPLAY

Financial Literacy

- ✓ Understand three steps to financial freedom
- ✓ How to prepare a budget
- ✓ How to cut back on expenses
- ✓ How to save more and plan for retirement
- ✓ How to set financial goals

WATCH REPLAY

Preparing for Retirement

- ✓ How do I want to retire?
- ✓ How much money will I need to retire?
- ✓ When is the right time to retire?
- ✓ Who do I share my retirement income with?
- ✓ What are the greatest risks to my retirement?
- ✓ How do I invest for retirement?

WATCH REPLAY

Estate Planning

- ✓ What is an estate plan?
- ✓ Who should have an estate plan?
- ✓ What can an estate plan help me accomplish?
- ✓ How does an estate plan work?
- ✓ What elements make up an estate plan?

WATCH REPLAY

Saving for College

- ✓ How much will college cost?
- ✓ How much should I save for college?
- ✓ Educational funding options
- ✓ Colleges needs analysis

WATCH REPLAY

PWA FINANCIAL

Scott Tomei CFP®, AIF®, MSFS | Senior Wealth Advisor | (916) 631-6882 | CA Insurance Lic # 0D13657

stomei@pwa-financial.com | 2356 Gold Meadow Way, Ste 140 Gold River, CA 95670