

LIFESTYLE AND PERSONAL SERIES

- + Debt Management- Advantages and disadvantages of debt, how much is right for your situation, how to minimize the net total cost of debt **1-21-2016**
- + Health Insurance and Health Savings Accounts (HSAs)- How to choose the right plan for your situation, how an HSA can be used to pay your medical bills and reduce taxes **3-3-2016**
- + Cybersecurity- Protecting your on line identity **4-7-2016**



BUILDING A SOLID FINANCIAL FOUNDATION SERIES

- + Build a Solid Financial Foundation I-The Emergency Fund- Why it's important, how to determine how much you need, how to invest the money **2-11-2016**
- + Build a Solid Financial Foundation II- Risk Management- What types of insurance should you have, and how much insurance do you need **3-10-2016**
- + Build a Solid Financial Foundation III- Estate Planning- Essential documents everyone should have **4-14-2016**

INVESTMENT RELATED SERIES

- + Building Your Investment Portfolio- How to construct and manage a portfolio aligned with your goals and risk tolerance **1-28-2016**
- + Personal Retirement Plans: Traditional vs. Roth IRA- How to determine which is best for you, or if you should have both of them, selecting and maintaining beneficiary designations **2-18-2016**
- + Tax Efficient Investment Strategies- How to choose different investments for taxable and tax-qualified accounts **3-17-2016**
- + Reducing Taxable Income Through Tax Loss Harvesting- How to use your portfolio to reduce taxable income and still keep your investment strategy on track **4-21-2016**

BUSINESS OWNER SERIES

- + Business Retirement Plans: Many to Choose From- How to determine which is best for you personally and for your employees **2-25-2016**
- + Business Owner Financial Management- Business valuation, succession planning and exit strategies **3-31-2016**

LEGAL, TAX AND WEALTH SERIES

- + Relationship Status and Asset Ownership- How to choose account and asset ownership types to protect your assets and beneficiaries, how and when to tell your advisors (financial, legal and tax) about your current relationship status and changes in relationship status **2-4-2016**
- + Elder Care Planning- Developing a plan to care for parents, partners and loved ones **3-24-2016**
- + Gift Planning- Strategies to ensure tax efficient wealth transfer to your target heirs **4-28-2016**

