IN CASE YOU MISSED IT

2025 Edition

CAPTRUST AT WORK

WEBINARS

- **Ask CAPTRUST: Saving on a Tight Budget**
  This webinar provides creative and practical strategies for saving money on a tight budget. Participants will learn how to identify areas where they can cut costs, prioritize saving, and make small changes that can add up over time. The webinar will also recommend low-cost savings tools and resources.

- **Creative Ways to Reduce Expenses**
  This webinar explores unconventional ways to save more money, from cutting hidden costs to finding new income streams. Participants will learn how to identify overlooked savings opportunities and make small changes that can lead to significant results over time.

- **The Power of Dollar Cost Averaging**
  This webinar defines dollar-cost averaging, a strategy that involves investing a fixed amount of money at regular intervals, regardless of market conditions. Participants will learn how this approach can reduce the impact of market turbulence on their portfolios over time.

- **Ask CAPTRUST: The Annuity Product For You**
  This webinar explores different types of annuities, including fixed, variable, and indexed annuities. Participants will learn how to evaluate annuity products; how to assess costs, risks, and benefits; and how to determine if an annuity is a good fit for their retirement income strategy.

- **Should You Consider Partial Retirement**
  This webinar explores the concept of partial retirement, where individuals gradually reduce their work hours while transitioning into full retirement. Participants will learn about the financial and lifestyle benefits of partial retirement, as well as tips for negotiating flexible work arrangements with their employer.

- **Financial Planning for Caregivers**
  This webinar provides strategies for managing the financial aspects of caregiving, including budgeting, accessing government benefits, and planning for long-term care. Participants will also learn how to prioritize their own financial future while fulfilling their caregiving responsibilities

VIDEOS

- **LIFE | Saving to Buy a Home**
  This video provides step-by-step guidance on how to save for a down payment on a home, including setting a savings goal, creating a dedicated savings plan, and exploring down payment assistance programs. Viewers will learn how to prioritize saving for a home without sacrificing other financial goals.

- **Common Savings Mistakes**
  This video addresses common savings mistakes and provides strategies to avoid them. Viewers will learn how to diversify their savings, optimize their use of employer benefits, and create a balanced savings strategy that supports their personal financial goals.

- **Investing in Your 30's and 40's**
  This video provides investment tips and strategies specifically for mid-career workers, including how to balance debt repayment with investing, start investing with limited funds, and take advantage of employer-sponsored savings plans.

- **What are Bonds?**
  This video explores the role of bonds in an investment portfolio. Viewers will learn about different types of bonds, such as government, corporate, and municipal bonds, and how to invest in them.

- **LIFE | Finding Purpose in Retirement**
  This video discusses the emotional side of retirement and provide tips for preparing mentally, socially, and emotionally. Viewers will learn how to create purpose, stay connected with others and maintain a positive outlook.

- **Downsizing for Retirement**
  This video provides tips for downsizing, including how to reduce housing costs, take control of discretionary spending and find affordable options for travel and entertainment. Viewers will also learn how to adjust their budget and prioritize their spending to support a comfortable and financially secure retirement lifestyle.

- **LIFE | 3 Steps to Create an Emergency Fund**
  This video explains the importance of having an emergency fund and provide practical steps to build and maintain one. Viewers will learn how much to save, where to keep the funds, and how to make saving for emergencies a habit.

- **Protecting Your Financial Identity**
  This video provides practical tips for protecting your financial identity, including how to secure personal information, monitor your credit, and respond to theft. Viewers will also learn about common scams and how to avoid them.

IN CASE YOU MISSED IT

2025 Edition

CAPTRUST AT WORK

ARTICLES

February
- Understand HSAs

March
- Secure Your Retirement Savings: The Three Bucket Strategy

April
- Ask the Experts: What Do I Need to Know About Investing in AI?

May
- Ask the Experts: Should I Consolidate My Assets?

June
- The Emotional Values of a Dollar

July
- A New Tax Law Has Arrived. Here's What to Know.

August
- Ways to Ensure a Tax-Smart Retirement

September
- Remorse Code: Unraveling Regret

October
- End-of-Year Tax Planning

November
- Hack for Outwitting Hackers and Avoiding Scams

December
- Retiring Your 401(k)
- Gift and Estate Taxes