



Welcome to the City of Milwaukee Financial Wellness Seminars

You are invited to attend a seminar of your choice. Please feel free to bring your lunch with you, as lunch will not be provided. **Receive 5 Healthy Rewards points for attending a 45-minute session*.**

Advance registration is necessary due to limited seating. Please register through your Training Information Coordinator (see reverse side). ***Please provide your Training Information Coordinator with the Course Number and your 6-digit employee ID number.***

Plan for Your "Someday"

Are you in your 20s or 30s and feel that you can't possibly think of focusing on saving for retirement? In this seminar, we will show you how taking small, meaningful steps in the early stages of your career can make a large impact for you later in life. We will provide you with tips on creating a solid plan, now, to help you achieve your dreams for that "someday."

Small Steps, Great Strides (Ideal for those in their mid-career)

Whether you are close to retirement or several years away, there are simple steps you can take, now, to assist you in achieving your retirement saving goals. This seminar will focus on setting a goal, checking for progress and thinking about a retirement income plan.

Investing Concepts

This engaging seminar is a classic "101" class on investments that explains investment types, investment trends and performance. It will also discuss your Deferred Compensation plan's specific investment options, as well as the fees that are associated with the plan.

Retirement Planning for Women

This seminar examines how women view money differently than men and what steps they can take to build a retirement plan based on these differences. It will discuss a 5-step plan you can put into place to build a retirement plan and how tools such as My Personal Financial Dashboard and myOrangeMoney can assist with these goals. We will also explain different investment options, building a portfolio and Target Date Funds.

Save for your Goals with Smart Budgeting

This "how-to" seminar reviews the basics of living within a household budget to assist you in managing your finances more efficiently. You will learn about setting short-term and long-term goals and balancing income and expenses, helping you to streamline your efforts of saving and working towards your financial objectives. We will also review practical tips on cutting expenses, managing debt and using credit to help boost FICO scores.

Retirement Readiness with my OrangeMoney

This seminar will focus on the myOrangeMoney tool and how to use it to estimate income replacement. We will provide information on calculating expenses in retirement and setting an income goal, as well as discuss CMERS pension benefits, Social Security benefits, Roth versus pre-tax and Voya Professional Advice options.