



STRATEGIC FOCUS: SAVE WEBINARS

- **ASK CAPTRUST: 2024 Changes That Could Affect Your Savings (January 17 | 1 p.m. ET)**
In our short-form webinar series, ASK CAPTRUST, we tackle big topics in small amounts of time. This quarter, join the CAPTRUST team to learn about SECURE 2.0 retirement savings legislation and how it could affect you as a retirement plan participant. [Link to registration: **Upcoming Webinar! ASK CAPTRUST: 2024 Changes That Could Affect Your Savings**](#)
- **New Year, New Financial Goals (February 21 | 1 p.m. ET)**
Are you preparing to make a major purchase, like putting a down payment on a house, having your dream wedding, moving out of your parents' home, or taking that bucket list vacation? With every major expense comes major planning. Join our panel discussion as we examine and suggest savings strategies for the milestones in your life. [Link to registration: **Upcoming Webinar! New Year, New Financial Goals**](#)

VIDEOS

- **Market Update (January)**
CAPTRUST's Chief Investment Officer, Mike Vogelzang, outlines what has happened in the markets and explains it relative to the participant perspective.
- **The Basics of Roth Savings (February)**
A Roth account is one way to save money for retirement. Depending on your personal financial picture, Roth savings may also help you reduce your tax bill. In this Lessons in Financial Experiences (LIFE) video, learn about Roth accounts and how they can be used in employer-sponsored plans.
- **Budget to Save More (March)**
There are dozens of ways to write a healthy budget. What's important is to have a clear understanding of your cash flow, income, expenses, and goals. That way, you can be sure your budget is just right for you. In this video, learn different ways of budgeting to save more for future goals.

ARTICLES

January

- Ask the Experts: 529 Funds
- 3 Tips for Repaying Student Loans

February

- Estimating Your Retirement Income Needs

March

- Tax Planning for Annuities
- Modern Financial Wisdom for Graduates



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All dates and titles subject to change.

