Workplace financial education programs

SAVING : INVESTING : PLANNING

FINANCIAL LITERACY SEMINAR SERIES

In an effort to help you meet your growing obligation to provide your employees with fundamental financial principles, VALIC provides an extensive array of objective, educational programs that are convenient for your employees to attend — because we conduct them where they work!

Improving employee financial literacy

The President's Advisory Council has identified improving the financial literacy of employees as a tremendous opportunity for America's employers, both for their own interests and those of the nation.

VALIC educational programs

VALIC offers educational programs that introduce general financial principles that can be of interest to your employees at any stage of their career or financial planning process. Each educational program includes a PowerPoint presentation, a workbook and promotional materials such as fliers, posters, emailed and printed invitations.

Seminar	Topic
Millennials	This program addresses the distinct challenges faced by a younger generation—such as increased student loan debt and underemployment—and provides guidance and strategies that can help with early planning for a more secure financial future.
Social Security and your Retirement	Social Security is an important element in retirement planning. This program explores the cost of retirement, as well as options for claiming and maximizing Social Security benefits and how to bridge possible income gaps.
Retirement Income Strategies	This program focuses on the new retirement realities and how the essential income planning process can help attendees address the five risks associated with retirement: longevity, healthcare, inflation, investment and withdrawal.
Your Retirement Plan at Work	This seminar stresses the importance of saving for retirement as it encourages attendees to enroll in their workplace retirement plan. This program is especially ideal for early career employees or those who have not yet enrolled in their workplace retirement plan.
Retirement Strategies for Women	Focusing on overcoming the financial hurdles specific to women as they plan and invest for the future, this program emphasizes the importance of having a personal plan, a sound strategy and a consistent approach to saving.
Planning for Financial Security	This comprehensive program provides useful information about financial planning by addressing the main areas of financial planning: Cash management, tax planning, risk management, retirement planning, estate planning, investment planning, and long-term care.

Planning for Financial Security topical educational series

The Planning for Financial Security educational program is also available in a topical educational series format. Each topical addresses a specific aspect of financial planning that can assist your employees toward becoming more fiscally fit.

Choose from the list below. Workbooks are also available for each topical course.

Topical Seminar	Course Topics
Cash Management	> Assessing existing spending habits > Setting financial goals > Creating a written budget > Starting a savings plan
Risk Management	> The different types of insurance to help safeguard against risk > Looking for a highly rated insurance company > Planning annual reviews to ensure proper coverage
Investment Planning	> Determining risk tolerance and time horizon > Developing an investment strategy > Diversifying investments > Planning reviews of portfolio to ensure proper allocation
Retirement Planning	> Calculating the cost of retirement > Determining sources of income > Defining the role of Social Security > Taking advantage of a workplace plan
Long-term Care	> Calculating the cost of long-term care > Identifying the four ways to pay for long-term care > Evaluating long-term care insurance providers

Discuss with your VALIC financial advisor the topics that would be most beneficial to your employees' financial growth.

Online registration available to your employees

Registering for an educational program with VALIC is easy with the VALIC online registration tool. Your VALIC financial advisor can use this system to create, manage and implement your educational events; all you need to do is provide a date, time and location. Your VALIC financial advisor will do the rest. Registering is as easy as 1, 2, 3.

Step 1 Getting started	Your employees visit https://my.valic.com/seminars where they enter a unique Registration Code that is listed on the emails, fliers or posters distributed to them from their VALIC financial advisor.
Step 2 Event and appointment registration	Your employees select from the list of available educational events.
Step 3 Complete registration	Your employees enter their names and contact information and select "Register."

Upon completing registration, the registrant will receive an online and email confirmation.

Online registration is a valuable resource that provides your employees with:

> A description of the educational program and a MapQuest map of the location

> Automated confirmation email after registration

> Automated reminder email 48 hours prior to the event

Contact your VALIC financial advisor and ask about educational programs and online registration.

VALIC offers a comprehensive library of online financial education courses that your employees can take at their own pace.

Online education opportunities

Help your employees get their finances in shape by offering them VALIC computer-based financial planning courses. These 15-minute online training modules are perfect for employees who have limited time or opportunity to participate in instructor-led sessions.

Employees can choose from these Planning for Financial Security educational topics:

> Cash management

> Risk management

> Investment planning

> Tax planning

> Retirement planning

> Estate planning

> Long-term care

Each presentation features:

> Easy-to-follow instructions and examples

> A check-for-knowledge section

> A certificate of completion

You can use the certificate of completion, which employees can print or save, to track participation or fulfill CE credit requirements.

Ask your VALIC financial advisor about ways to share this online education program and promote participation with employees.

Employee education matters

Let us help your employees take charge of their retirement planning

CALL
1-800-972-6978

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VC 16422 (10/2015) J95973 ER

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