EQUITABLE
ADVISORS

Educational Webinars For Your District

Presented By: Equitable Advisors, and made available through your SAANYS Membership

Below are topics we can cover. To set up a webinar, presentation or series of presentations, email SAANYSmembers@equitable.com. Include the topics you'd like presented, and your desired timeline.

Considerations for a Successful Retirement	Learn about the 5 things to consider while planning for your retirement, it's never too early!
Ready to Retire	This topic is for people that are within 3 years of retirement and discusses items such as your NYS Pension and payout options, 403(b)'s and sick day payouts, preparing your budget for retirement, and some of the more nuanced things that should be done when preparing to retire.
Public Student Loan Forgiveness	Public Student Loan Forgiveness (PSLF) programs began in 2007 and have come a long way since then. Join us to learn more about eligibility and next steps to apply.
Life Insurance Awareness	Outlines the role of life insurance, the beneficial tax treatment of its cash value and different ways to calculate the amount of life insurance one needs. Also reviews various types of life insurance and optional riders.
Pension Planning	Learn more about your NYS Pension including collection strategies, your pension options, taxes, and more.
All about the 403(b)	Learn about the benefits of using a 403(b) retirement account, and best practices to adhere to that will help this plan support you in reaching your dream retirement.
Social Security Planning	How is your social security calculated and what are some collection strategies that can affect your financial plan in retirement? In this seminar we'll go through these things and more on this very important topic.
Financial Wellness	Explains the advantages of smart financial management. Reviews five financial management components: cash management, risk management, estate planning, investment strategies, tax reduction strategies and retirement programs.
Share Your Love: Family Discussion Guide	Preparing for the inevitable is a tough discussion that can be difficult to have. Learn how to initiate an open, thoughtful dialogue with your family as you plan for the future and how to honor any final requests. Topics covered: where to find important documents and key contacts; who should care for loved ones and minors; and who you want to handle decision-making if you become incapacitated.
How Do I Pay for College?	Overview of the need to plan for a college education and the types of planning vehicles available, including UGMA/UTMA, Coverdell savings accounts and 529 plans.
Tax Time! Planning Accordingly	Learn some very important financial considerations and actions you may want to take as you start to prepare your taxes
Summer Planning Checklist	With summer upon us, it is a good time to review your financial strategy and make impactful financial changes for the new school year. Learn about what to prepare and how to go about making effective changes.