A Lunch & Learn Webinar Series

Grab your lunch and join us once a month at noon for Financial Fridays with Equitable Advisors. These short, 30-minute online sessions are meant to offer tips and ideas for securing your personal financial success.

November 5 – Pension Maximization

For most administrators, the New York State Pension represents the largest part of your retirement plan. How can we take steps to fully maximize this benefit? Waiting until just before retirement isn't the answer. Learn what you can do ahead of time to plan most effectively to maximize your pension benefit. REGISTER

December 3 – Loan Forgiveness Options

There are many "ins and outs" of the State and Federal Loan Forgiveness Programs. This presentation provides an overview of the multiple programs that are available, and how to make sure you are taking advantage of each one of them. The potential savings from this discussion could be tens of thousands of dollars, so don't miss it. REGISTER

January 7 – When Can I Retire?

This discussion will provide you with a roadmap to begin the conversations regarding looking at your current retirement situation and how to decide if you can retire sooner than originally planned. REGISTER

February 4 – Proper Planning for Social Security Benefits

The Social Security system is one of the most important, and often misunderstood, retirement systems out there. Making the right decision is critical to your retirement planning. This seminar provides helpful information about Social Security. REGISTER

March 4 – Life Insurance Planning

Nobody really enjoys talking about life insurance, but we all know that our families need to be protected in the unfortunate event of us passing away prematurely. In this session, we will make life insurance planning as painless as possible by looking at the different types of plans available, how to determine your family's need for coverage, and the ways to cost-effectively provide the benefit. REGISTER

April 1 – Investments and the Markets

How do we maximize returns without being overly aggressive? What are the key financial challenges in turbulent markets, and how should you navigate your financial matters during uncertain times? This presentation features four segments: putting market volatility and risk in perspective; identifying practices that could make a difference - in good times or bad; using risk management strategies to help protect investments, and suggesting next steps. REGISTER

May 6 – Estate Planning and the Family Love Letter

This presentation covers how a properly created estate plan can help protect a family's financial well-being, preserve property, reduce estate taxes and expenses, as well as help avoid family conflict. Included is a basic overview of the Family Love Letter and its contents, emphasizing the importance of estate planning strategies if sudden incapacitation or death should occur. REGISTER

June 3 – Planning for the Early Career Administrator

You are early in your administrative career, and while you know that you can't retire tomorrow, you know that you need to really do some planning in order to make whatever retirement date you select a reality. Even though you may think it's early, there are steps that can be taken now to create a comprehensive game plan in order to make your plans come to fruition. Many times, the biggest hinderance is simply not getting started. We will discuss simple, implementable solutions that you can take now to put a plan in place. REGISTER

School Administrators Association of SAANYS New York State

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