



# Boost your financial literacy!



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## Essential Financial Wellness topics

Are you just starting to dip your toes into learning about finance? Or, would you like to brush up what you already know? This section is for you. Topics cover the essentials of financial literacy and their practical application in everyday life.

| Date & Time                                                                        | Name                                                                                           | Description                                                                                                                                                                                                                                                                                                                                              |
|------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Thursday, January 14, 2027 at 3 p.m. ET                                            | <a href="#"><u>Reviewing your financial roadmap</u></a>                                        | Whether you're just starting out or thinking about retirement, learn how to build a financial plan, including ways to minimize taxes.                                                                                                                                                                                                                    |
| Tuesday, Feb 9, 2027 at 3 p.m. ET<br>Wednesday, November 24, 2027 at 12 p.m. ET    | <a href="#"><u>5 steps to boost your financial health</u></a>                                  | New to managing your money? This beginner-friendly webinar will guide you through five essential steps of personal finance to boost your financial health.                                                                                                                                                                                               |
| Wednesday, March 24, 2027 at 12 p.m. ET<br>Thursday, October 14, 2027 at 9 p.m. ET | <a href="#"><u>Building your wealth through investing</u></a>                                  | Join us and explore how to build wealth, manage risk and align your investment decisions with your specific priorities.                                                                                                                                                                                                                                  |
| Tuesday, April 20, 2027 at 6 p.m. ET<br>Monday, November 8, 2027 at 2 p.m. ET      | <a href="#"><u>Save for retirement now</u></a>                                                 | We'll introduce you to retirement planning and answer questions like how much will retirement cost? Where will the money come from?                                                                                                                                                                                                                      |
| Wednesday, May 5, 2027 at 3 p.m. ET<br>Thursday, September 23, 2027 at 6 p.m. ET   | <a href="#"><u>Maximizing your retirement: understanding CPP/QPP, OAS and GIS benefits</u></a> | Planning for retirement? Join us for this webinar that breaks down Canada's key retirement programs: the Canada Pension Plan (CPP), Quebec Pension Plan (QPP), Old Age Security (OAS), and Guaranteed Income Supplement (GIS). This session will help give you the knowledge and tools to make informed decisions and build a stronger financial future. |
| Thursday, June 17, 2027 at 12 p.m. ET<br>Thursday, December 2, 2027 at 3 p.m. ET   | <a href="#"><u>Bridge the gap between your health and finances</u></a>                         | Join us as we explore the link between health and finances, the financial impacts of a serious illness and health care options for your retirement years. This webinar is best suited for anyone who wants to focus on mental, physical and financial wellbeing as part of their overall financial plan.                                                 |



## In-depth Financial Wellness topics

If you're comfortable with the basics of financial literacy and are looking for a more in-depth knowledge and tips, pick this category. Here you will find webinars about investing, financial planning, retirement and more.

| Date & Time                                                                          | Name                                                                                                 | Description                                                                                                                                                                                                                                                                                                                                                          |
|--------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Tuesday, January 12, 2027 at 12 p.m. ET<br>Wednesday, June 16, 2027 at 3 p.m. ET     | <a href="#"><u>Making the most of your retirement with Sun Life</u></a>                              | Ever wondered what retirement is really like? Join this panel discussion as we walk through some of the top questions, concerns, and surprises that retirement can bring.                                                                                                                                                                                            |
| Wednesday, February 24, 2027 at 6 p.m. ET<br>Monday, December 13, 2027 at 12 p.m. ET | <a href="#"><u>Building a resilient retirement paycheck</u></a>                                      | Market volatility can create a lot of doubt but having a good financial strategy can ease your concerns. See how you can manage volatility and protect your retirement paycheck.                                                                                                                                                                                     |
| Monday, March 8, 2027 at 12 p.m. ET                                                  | <a href="#"><u>Financial considerations for women</u></a>                                            | Women face unique financial challenges. Join us as we explore these challenges and ways to overcome them.                                                                                                                                                                                                                                                            |
| Thursday, April 15, 2027 at 9 p.m. ET<br>Tuesday, October 5, 2027 at 3 p.m. ET       | <a href="#"><u>Navigating the sandwich generation: three generations, one financial strategy</u></a> | Are you juggling the responsibilities of caring for aging parents while supporting your own children? You're not alone - the sandwich generation faces unique financial and emotional pressures. Join us to learn how to navigate the complex financial landscape of the sandwich generation while making informed decisions about inheritances and estate planning. |
| Thursday, May 13, 2027 at 6 p.m. ET                                                  | <a href="#"><u>Financial planning for the modern family</u></a>                                      | Each family structure has unique needs and financial planning can be complex. Join us as we discuss potential pitfalls and the importance of tailoring a financial roadmap to your unique situation.                                                                                                                                                                 |
| Wednesday, September 15, 2027 at 12 p.m. ET                                          | <a href="#"><u>Estate &amp; taxes: The essentials</u></a>                                            | This session will focus on providing for your loved ones, learning the importance of designating a beneficiary and passing on your estate in a tax efficient manner.                                                                                                                                                                                                 |
| Tuesday, November 2, 2027 at 12 p.m. ET                                              | <a href="#"><u>Investing: a closer look</u></a>                                                      | This webinar is best suited for those that are looking to expand their knowledge and understanding of investment principles.                                                                                                                                                                                                                                         |
| Thursday, November 18, 2027 at 3 p.m. ET                                             | <a href="#"><u>Where there's a will, there's a way</u></a>                                           | This session is for anyone who wants to understand how to protect their assets and family as part of their overall financial plan. Topics include what happens without a will, why we need a power of attorney and how to minimize taxes at death.                                                                                                                   |