Financial Wellness Education Webinars

Legacy Financial Group (LFG) has the pleasure of partnering with ISAC to expand the Financial Wellness Programming by bringing real life financial planning experience to the workplace. Education is the backbone of LFG and we enjoy helping people learn through employer-based programming, as well as one-on- one consultation.

MONEY MATTERS - February 16th, 2022
Overview: Without clarity and confidence, money can often be a source of stress and anxiety. Money impacts nearly every aspect of our lives, and getting it right takes planning. This program will help you understand the importance of taking action in your financial life as well as equip you with practical tools and resources. Whether you are just getting started or on the cusp of retirement, we'll cover important concepts and actionable strategies to help you improve your financial future.

Course Objectives:
1. Identify and prioritize your financial goals
2. Put your goals into motion and establish ways to monitor progress
3. Evaluate impactful ways to apply your income and savings
4. Determine strategies to balance both paying down debt and saving for the future

RETIREMENT READINESS - April 20th, 2022
Overview: Are you prepared for one of the biggest transitions in your life? Retirement consists of piecing together a big puzzle, composed of a variety of different resources, to ensure you have enough to live the life you want. This educational session will arm you with information needed to clarify your path to a successful retirement.

Course Objectives:
1. Discover options for deciding when and how to tap your Social Security benefits
2. Identify retirement income strategies to first, cover basic needs; second, fund your "wants"; and third, still leave room for possible unexpected "surprises"
3. Learn tax planning and efficient distribution strategies to minimize Uncle Sam's impact on your retirement nest egg

INTRODUCTION TO ESTATE PLANNING - July 20th, 2022
Overview: Join us for a financial education discussion focused on estate planning topics to consider as life unfolds. If you were to become incapacitated or die today, who will take control of your assets, settle your debts and care for any minor children? Do you have the correct documents in place to direct them or are you leaving some decisions up to the courts and the state?

Course Objectives:
1. Gain sound financial information around estate planning
2. Understand the impact of not having proper estate planning documents in place
3. Learn the importance of updating beneficiary designations, trusts, proper titling, and wills
4. Identify actions steps to clarify your individual estate planning intentions and minimize fees and taxes

1:1 virtual consultations are also available for ISAC employees at a reduced hourly rate to discuss these topics in person.

ISAC
Iowa State Association of Counties

LFGplanners.com **800.616.4392**

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