



January - March 2021 | BrightPlan LIVE Webinar Schedule

Webinar Summary

[Friday, January 15: Get Started with BrightPlan at 10am PT](#)

[Friday, January 22: Finance Fridays - The Secret to Achieving Your Financial Goals at 12pm PT](#)

[Thursday, January 28: Successfully Managing Company Stock at 12pm PT](#)

[Friday, February 5: Finance Fridays - The Science of Building Wealth at 12pm PT](#)

[Friday, February 19: Get started with BrightPlan at 10am PT](#)

[Friday, February 26: Finance Fridays - Becoming a 401\(k\) Millionaire at 12pm PT](#)

[Friday, March 5: Finance Fridays - How to Perform an Investment Check- Up at 12pm PT](#)

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[Friday, March 26: Finance Fridays - How to Set Up Your Emergency Fund at 12pm PT](#)

Friday, January 15: Get Started with BrightPlan: How to Achieve Your 2021 Goals at 10am PT

Registration link: <https://web.brightplan.com/get-started-with-brightplan-webinar>

Description: What money goals will you achieve in 2021? Whether you're looking to buy a new car, set up a college fund for Junior, max out your company 401(k), or pad your Emergency Fund, BrightPlan can help. Join our 30-minute webinar Friday, January 15th at 10am PST to see how you can boost your financial wellness with BrightPlan's digital platform and financial advisors. You'll leave with clear goals, advice on how to invest your 401(k), and the next steps to improve your financial well-being.

Friday, January 22: Finance Fridays - The Secret to Achieving Your Financial Goals at 12pm PT

Registration link: <https://web.brightplan.com/finance-fridays-secret-to-achieving-financial-plan>

Description: Whether it's buying a home, paying off debt, or retiring in style - we all have dreams we hope to achieve. Setting clear financial goals with a system to support them may be the best way to make your dreams a reality. Register to learn how to set goals and automate progress towards them in BrightPlan.

Thursday, January 28: Successfully Managing Company Stock at 12pm PT

Registration link: <https://web.brightplan.com/successfully-managing-company-stock>

Description: Company stock can be a powerful form of compensation that helps you towards your financial goals. A growing company stock position also raises big questions:

- What is the role of company stock in my broader investment strategy?
- How do I balance diversifying my position and paying a big tax bill?
- Should I use this money for goals like retirement or buying a home?

Register to learn best practices for managing RSUs, ESPP, and stock options as part of your financial plan.



Friday, February 5: Finance Fridays - The Science of Building Wealth at 12pm PT

Registration link: <https://web.brightplan.com/finance-fridays-the-science-of-building-wealth>

Description: Building wealth is not a mystery. Your money can be measured, and increasing your net worth can be traced to a few intentional decisions. Based on lessons from decades of studying millionaires, this webinar will share:

- The formula to calculate your current wealth (your net worth)
- Key decisions that could set you up for a better financial future
- How to track your money easily in BrightPlan

Friday, February 19: Get started with BrightPlan at 10am PT

Registration link: <https://web.brightplan.com/get-started-with-brightplan-webinar-2-19>

Description: More people than ever are using BrightPlan to boost their financial wellness. Ready to get started? Your company provides you with access to BrightPlan so you can get solid financial advice in your best interest. We're hosting a 30-minute webinar to get you started. Join us to learn how easy it can be to keep track of your money, set financial goals, and chat with a financial advisor. You'll leave with a retirement goal, advice on how to invest your 401(k), and next steps to improve your financial wellness.

Friday, February 26: Finance Fridays - Becoming a 401(k) Millionaire at 12pm PT

Registration link: <https://web.brightplan.com/finance-fridays-becoming-a-401k-millionaire>

Description: A record 262,000 Fidelity clients are now 401(k) Millionaires, well on their way to a cushy retirement. Wondering how you can sign in to your 401(k) and see that sweet seven figure balance? Come learn why a 401(k) is such a powerful tool for building wealth, and the 5 steps to consider today to increase your retirement savings.

Friday, March 5: Finance Fridays - How to Perform an Investment Check- Up at 12pm PT

Registration link: <https://web.brightplan.com/finance-fridays-how-to-perform-an-investment-check-up>

Description: The most common question our advisors get about investing is, "Am I doing this right?" Investing is a complex subject, but knowing a few straightforward rules can help you evaluate your investments. Register to learn how to perform an investment check-up on *all* of your investments in BrightPlan, and what to do when changes should be made.

Wednesday, March 10: Advanced Trust & Estate Planning at 10am PT

Registration link: <https://web.brightplan.com/advanced-trust-and-estate-planning>

Description: Ever wonder why wealthy individuals and families use trusts to protect and transfer assets from generation to generation? In this webinar senior advisors from Plancorp will share three advanced Trust Planning techniques they use regularly with clients to save on taxes and transfer homes, businesses, investments, and other assets from one generation to the next with a minimal tax bite.

Friday, March 19: Get started with BrightPlan at 10am PT

Registration link: <https://web.brightplan.com/get-started-with-brightplan-webinar-3-19>



Description: More people than ever are using BrightPlan to boost their financial wellness. Ready to get started? Your company provides you with access to BrightPlan so you can get solid financial advice in your best interest. We're hosting a 30-minute webinar to get you started. Join us to learn how easy it can be to keep track of your money, set financial goals, and chat with a financial advisor. You'll leave with a retirement goal, advice on how to invest your 401(k), and next steps to improve your financial wellness.

Friday, March 26: Finance Fridays - How to Set Up Your Emergency Fund at 12pm PT

Registration link: <https://web.brightplan.com/finance-fridays-how-to-set-up-your-emergency-fund>

Description: When it comes to boosting your financial well-being, having a cash reserve is key. With a fully-funded cash cushion, you can rest easier knowing you're prepared for life's curveballs. Register to learn:

- Why we all need a cash reserve (even during the good times)
- How much money to set aside (and where to stash it)
- 3 ways a cash reserve could make you wealthier