Helping You Turn Over a New Retirement Leaf

Wisconsin Deferred Compensation Program Fall 2023 Webinars

Your guide to the Wisconsin Deferred Compensation Program's (WDC) virtual group webinars. Choose the desired topic(s) below and find a date and time that works for your schedule. Once you click on a date and time, you will be directed to register for your selected webinar(s).

Your Journey to Retirement: Whether you are participating in the Wisconsin Deferred Compensation Program (WDC) or not, join us to learn about the value and the benefits of saving and investing for your retirement through the WDC. In this session we will help you understand:

- WDC basics like enrolling, contribution limits, investment options, and pre-tax vs. Roth contributions
- Risk and Asset Allocation
- Rollovers into the WDC
- What is included in a Retirement Readiness Review

Tuesday, September 26th – 11:30 am
Wednesday, September 27th – 12 pm
Thursday, September 28th – 9 am
Tuesday, October 3rd – 11:30 am
Thursday, October 5th – 1 pm

Tuesday, October 10th– 4 pm
Thursday, October 12th – 11 am
Tuesday, October 17th – 12 pm
Wednesday, October 18th – 12 pm
Thursday, October 19th – 1pm

A local WDC Retirement Plan Advisor will be available to answer questions and provide additional resources at the end of the webinar.

Can't wait? Watch a video about this topic on demand 24/7. If you are already enrolled in the WDC, click here to schedule a Retirement Readiness Review*.

*The Retirement Readiness Review is provided by an Empower representative registered with Empower Advisory Group, LLC and may provide investment counseling and/or recommendations at no additional cost to participants. There is no guarantee provided by any party that use of the review will result in a profit.

Retirement Planning with the WDC: What steps do you need to take to get ready for and enjoy your retirement? In this session we will cover:

- Sources of retirement income
- Pre-retirement outlook
- Taking a withdrawal & accessing your WDC account
- Retirement Readiness Reviews

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Women and Investing: Through this webinar, learn how to use WDC resources to become more confident about your financial future. In this session we will cover:

- Mindset and factors women face
- Coming up with a plan to help reach your goals
- Steps to success
- Retirement Readiness Review

Thursday, October 12th – 1 pm

A local WDC Retirement Plan Advisor will be available to answer questions and provide additional resources at the end of the webinar.

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Participant Experience: Learn how the WDC's personalized web experience can help simplify your financial life with tools that help you manage your day-to-day finances. In this session we will cover:

- Linking accounts
- Budgeting & financial tools including retirement and savings planners
- Personalized guidance

Thursday, October 12th-12 pm

A local WDC Retirement Plan Advisor will be available to answer questions and provide additional resources at the end of the webinar.

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Financial Wellness Education: Learn how the financial choices you make now affect not only your financial well-being today but how it can impact how you live in the future. In this session we will cover:

- Steps you can take to achieve financial wellness
- Ways to help you take control of your finances, including steps for debt reduction
- Saving for an emergency

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Thursday, September 28th – 12 pm
Wednesday, October 3rd – 4 pm
Tuesday, October 10th – 12 pm
Wednesday, October 18th – 12 pm
Thursday, October 19th – 11:30 am

A local WDC Retirement Plan Advisor will be available to answer questions and provide additional resources at the end of the webinar.

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Maximizing Your Retirement (Retiree): What does your retirement look like? Learn where your money can come from after you retire and if you'll have enough to live the retirement you imagined:

- Sources of retirement income
- Retirement expenses and budgeting
- High level overview of Medicare and Social Security
- Investing during Retirement
- Withdrawals from the WDC and other resources

Wednesday, October 4th 10 am
Wednesday, October 11th 11:30 am
Tuesday, October 17th 12:30 pm

A local WDC Retirement Plan Advisor will be available to answer questions and provide additional resources at the end of the webinar.

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Social Security: This webinar provides a look at when you can start collecting Social Security and the tradeoffs of collecting early versus delaying. This session is geared for mid and late-career audience, and we will cover:

- Social Security eligibility
- Individual & spousal benefits
- Maximization strategies

Wednesday, September 27th – 10 am

A Financial Planner with Empower will be available to answer questions and provide additional resources at the end of the webinar. A local WDC Retirement Plan Advisor will also be available to answer WDC-related questions at the end of the webinar.

Healthcare Costs in Retirement/Medicare: Learn about Medicare eligibility, enrollment, coverage, out-of-pocket expenses and more. This session is geared for late-career audience, and we will discuss:

- Planning for healthcare costs in retirement
- The basics of Medicare parts A, B, C & D, and supplemental Medicare plans (Medigap and Medicare Advantage)
- Medicare enrollment and health savings accounts

Tuesday, October 3rd -1pm

A Financial Planner with Empower will be available to answer questions and provide additional resources at the end of the webinar. A local WDC Retirement Plan Advisor will also be available to answer WDC-related questions at the end of the webinar.

Introduction to Taxes: In this entry-level presentation, we will cover different types of taxes:

- Basic tax fillings, forms
- Minimization strategies
- Common errors and misconceptions

Thursday, October 5th – 10 am

A Financial Planner with Empower will be available to answer questions and provide additional resources at the end of the webinar. A local WDC Retirement Plan Advisor will also be available to answer WDC-related questions at the end of the webinar.

LGBTQ+ Estate Planning: We will review the importance of estate planning for individuals in the LGBTQ+ community and covers topics such as:

- What is an estate plan and why you need it
- Various estate documents, beneficiary planning
- Next steps

Tuesday, October 10th – 1 pm

A Financial Planner with Empower will be available to answer questions and provide additional resources at the end of the webinar. A local WDC Retirement Plan Advisor will also be available to answer WDC-related questions at the end of the webinar.

Planning for the Unexpected/Estate Planning: Estate planning is often an overlooked topic when discussing financial planning. Learn about end-of-life planning for individuals and families of all income levels. This session is geared for all career levels and topics we will discuss included:

- The importance of having a plan to help protect your loved ones
- Components of an estate plan including reviewing common documents
- How insurance can be used to help minimize risk to your family

Wednesday, October 11th – 3 pm

A Financial Planner with Empower will be available to answer questions and provide additional resources at the end of the webinar. A local WDC Retirement Plan Advisor will also be available to answer WDC-related questions at the end of the webinar.

Steppingstones to Retirement: This webinar provides a look at how your Social Security, Wisconsin Retirement System pension, and WDC savings account will help you work toward a secure financial retirement. Speakers include:

- Wisconsin Retirement System: eligibility and benefits; Core and Variable Trust Funds; annuity options; beneficiaries; and working in retirement
- Social Security: eligibility for retirement benefits; how early retirement affects your benefits; qualifying for survivors and spouse benefits; when to file for Medicare
- WDC Program: WDC basics including contribution limits; investment options; pre-tax vs. Roth contributions; rollovers; and retirement readiness reviews

Wednesday, November 15th – 9 am

If you are already enrolled in the Wisconsin Deferred Compensation Program, congratulations! You are ahead of the game! You are eligible to participate in a Retirement Readiness Review now. Just scan the QR code to schedule your review today!