



# 2025 Financial Education Activities

Join us throughout the year for courses and activities designed to help you confidently achieve your financial goals. Content can only be accessed through the FinPath Dashboard.

## TAXES

**Jan. - Mar.**



### Tax Basics & Enhanced Tax Strategies Journey

**January 15th, 2025**

Deductions, exemptions, audits.. oh my! This month's journey will cover tax basics and getting organized, plus enhanced tax strategies for advanced groups.



### Taxes 101 and Taxes 201: LIVE Webinars

**February 13th, 2025**

Confidently navigate this tax season and avoid common pitfalls with this month's webinar, taught by the FinPath experts! Choose your webinar experience.



### The Tax Wrap Up

**March 5th, 2025**

Let's review your progress and keep working toward your goals. This wrap up will feature tools and tips to keep working toward your goals for the year.

## BUDGETING

**Apr. - Jun.**



### Financial Literacy Month Journey: Wallet Watch Challenge

**April 1st to 30th, 2025**

Celebrate Financial Literacy Month with FinPath! Join us for a month of engaging activities designed to boost your financial knowledge and empower your financial journey.



### Mastering Your Spending Plan: LIVE Webinar

**May 14th, 2025**

Discover how to create a budget that works for your lifestyle! In this live webinar, we'll explore realistic strategies for managing your money without feeling restricted.



### The Budgeting Wrap Up

**June 4th, 2025**

We're closing out the quarter with a recap of everything you've learned and action steps to keep your financial momentum going.

## SHORT-TERM GOALS

**Jul. - Sep.**



### Planning Short & Medium Term Financial Goals Journey

**July 16th, 2025**

That car, house, or vacation can be YOURS! Gain valuable insights, tools and strategies to saving for your short and medium term goals.



### Home Buying 101: LIVE Webinar

**August 20th, 2025**

We're diving into the essentials of homeownership with a live webinar that covers everything you need to know to confidently navigate the home-buying process.



### The Financial Goals Wrap Up

**September 9th, 2025**

We're closing out the month with a reflection on your progress and next steps to keep building toward your short term financial goals.

## LONG-TERM GOALS

**Oct. - Dec.**



### Retirement Security Month

**October 1st to 29th, 2025**

We're dedicating the month to building a secure financial future with educational resources and engaging activities to help you plan for retirement with confidence.



### Social Security Strategies

**November 12th, 2025**

Join us for a live webinar where we'll explore key strategies to maximize your Social Security benefits and make informed decisions for retirement.



### The Long Term Goals Wrap Up

**December 3rd, 2025**

We're wrapping up the year with a look back at your financial journey and actionable tips to start the new year strong.

## Registration is Open

Head to FinPath University in your account dashboard to pre-register for activities and receive text message reminders.

**Haven't activated your account?**

**Get started at [finpathwellness.com](https://finpathwellness.com)**

