Vanguard

2025 participant education calendar

Vanguard believes there's a direct correlation between participant education and participant engagement. That's why we're eager to offer access to the following resources throughout the year.

Quarterly email reminders

Q1 (March)	Q2 (May)	Q3 (August)	Q4 (October)
Save more We recommend putting 12% to 15% of your income toward retirement — now might be a good time to see if you're saving enough.	**Beneficiary designation** Prepare for the unexpected by making sure your account's beneficiaries are up-to-date.	**Retirement income** Find out how to withdraw retirement savings sustainably to support the lifestyle you want.	**Financial wellness** We know retirement isn't your only financial goal. Get support to help you make the right decisions along the way.

Webinar summaries

Financial freedom (FF)
This webinar is intended to help working Americans who feel they are headed in the wrong direction financially. Topics include paying down credit card debt, cutting costs, saving for retirement, and building an emergency fund.

Getting on track for retirement (GOT)
Participants under age 55 determine if they're on the right track for retirement and how to make adjustments to meet their retirement goals.

Is Roth right for you? (ROTH)
Participants learn the rules, benefits, and considerations for Roth contributions. This is usually paired with other presentations but can be delivered as a single topic.

Estate planning applies to everyone (EP)
Estate planning basics and the importance of estate planning are discussed for those who want to help secure their family's future. Tax considerations from the perspectives of the estate and the beneficiary are also covered. Learn about the practical steps you can take now to implement estate planning as you thoughtfully prepare to leave a legacy for your loved ones.

Principles of investing (POI)
Participants learn to take their basic knowledge of investing to the next level and gain a stronger understanding of Vanguard's investment philosophy and how to build a diversified, low-cost fund portfolio.

Protect your future (PYF)
In this webinar about plan distribution options, participants leaving the company are provided with an overview of their options moving forward, including rollovers, IRAs, and company stock options.

Retirement income/Forever Saturday (RIFS)
Employees who are within a few years of retiring learn how to turn savings into a steady paycheck.

Target-date investments (TDI)
Whether your employees want to learn more before investing in these funds or are already target-date investors, this webinar helps them understand what target-date investments are, how they work, and how to select a target-date investment that may be right for them.

Webinar schedule*

	11 a.m.	1 p.m.	4 p.m.
February 18	TDI	FF	
February 20		POI	TDI
May 6	PYF	TDI	
May 8		RIFS	TDI
August 5	TDI	ROTH	
August 7	TTR		TDI
November 4		TDI	GOT
November 6		EP	TDI

* All times shown are Eastern time.

Webinar registration

Join your plan webinar

All other webinars

Note: The links will remain the same for the entire 2025 webinar campaign.

Important information

All investing is subject to risk, including the possible loss of the money you invest. Diversification does not ensure a profit or protect against a loss.

Investments in target-date funds are subject to the risks of their underlying funds. The year in the fund name refers to the approximate year (the target date) when an investor in the fund would retire and leave the workforce. The fund will gradually shift its emphasis from more aggressive investments to more conservative ones based on its target date. An investment in target-date funds is not guaranteed at any time, including on or after the target date.

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