

# 2024 WEBINAR LINEUP

oswald*financial*

JAN  
18

Turning Retirement Savings  
into Lifetime Income

Replay [HERE](#) | Passcode: Oswald!0124



MAR  
21

Understanding Social  
Security Benefits

Replay [HERE](#) | Passcode: Oswald!0324



MAY  
15

The Complete Guide to  
Medicare Options

Replay [HERE](#) | Passcode: Oswald!0524



JUL  
17

Navigating Market  
Uncertainty

3pm EST | Register [HERE](#)



SEPT  
12

The Fundamentals of  
Estate Planning

11am EST | Register [HERE](#)




NOV  
13

Long-Term Care  
Insurance Options

3pm EST | Register [HERE](#)



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How We Work With Individuals

F(un)AQs - Getting Started

F(un)AQs - Approaching Retirement

F(un)AQs - In Retirement

Traditional vs. Roth

Borrowing From Your Retirement Account

Navigating Market Uncertainty

Importance of Rebalancing Your Portfolio

Distribution Options

Cyber Security

Social Security Basics

Medicare Basics

Long-Term Care

Practicing Well-Being & Stress Management

Inflation & Interest Rates Explained



**ASK US ABOUT YOUR PERSONALIZED PLAN SUMMARY VIDEO!**