

Summer School 2025: Financial Well-Being

Whether you are navigating your first financial milestones, managing day-to-day expenses, looking to maintain your lifestyle, or getting ready for retirement, the right decisions can help put you on a path to financial wellness.

UK is pleased to offer a Summer School curriculum presented by Fidelity Workplace Financial Consultants and is provided at no additional cost to you. Each class will be offered **virtually** and **in-person** at Noon ET on selected dates in the summer of 2025. To register for a **virtual workshop**, click below on the title of the session you wish to attend. To register for an **in-person workshop**, scan the QR Code and review instructions at the bottom of the flyer.

Course pre-work (Optional): Log in to review your personal **retirement account** details.
Create your own personalized **budget**.

Financial Wellness 101

June 4: [Create a Budget and Build Emergency Savings](#)
June 11: [Identify and Prioritize Your Savings Goals](#)
June 25: [Understanding Roth Contributions in Your Workplace Savings Plan](#)

Financial Wellness 201

July 9: [Investing for Beginners](#)
July 23: [Make the Most of Your Retirement Savings](#)
July 30: [Five Money Musts](#)

Mid-course check-in (Optional):

Take the **financial wellness checkup** quiz.
Complete the **Retirement Planning tool**.

Financial Wellness 301

August 6: [Prepare for the Reality of Health Care in Retirement](#)
August 20: [Preserving Your Savings for Future Generations](#)
August 27: [Top Things to Do Before You Retire](#)

Retirement Readiness Capstone

Sept. 3: [Learn the Basics of When and How to Claim Social Security](#)
Sept. 10: [Maximizing Social Security in Your Retirement](#)
Sept. 17: [Fundamentals of Retirement Income Planning](#)

Extra Credit:

Schedule a 1:1 [consultation](#) with a Fidelity Workplace Financial Consultant.
Appointments are available virtually or in-person at a time that works for you.



To Register for an *In-Person* Learning Event:

Location: 161 Lexington Green Circle, Suite 195, Lexington, KY
A complimentary light lunch will be provided. Register early as space is limited.

Call 800-642-7131* or,
Scan the QR Code** or,
Visit fidelity.com/schedule**

*Monday through Friday from 8:30 a.m. to 8:00 p.m. Eastern time.

Click on the QR Code or visit fidelity.com/schedule, then click on the tile "Attend a learning event**" > Event Search: enter **University of Kentucky** > Select Event Type: **In-Person Event**.

Investing involves risk, including risk of loss.

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