

## Caterpillar Inc.

is now offering the following financial education virtual workshops



### Smart Money Moves

10 tips to set yourself up for financial success.

**January 21<sup>st</sup>, 2026, 12:00-1:00 PM CST**

### Improving Your Mental and Financial Wellbeing

This workshop explores the often-overlooked relationship between mental and financial wellbeing.

**February 18<sup>th</sup>, 2026 12:00- 1:00 PM CST**

### Be an Investor: Tips on Ways Your Money Can Work for You

Learn about making the right financial moves, from establishing goals and managing risk to building a portfolio.

**May 18<sup>th</sup>, 2026, 12:00-1:00 PM CST**

### Understanding Social Security

Need help with when to take Social Security? We can help you sort it out.

**April 22<sup>nd</sup>, 2026, 12:00-1:00 PM CST**

### Estate Planning

Find out why everyone needs an estate plan and how to avoid common mistakes.

**May 20<sup>th</sup>, 2026, 12:00-1:00 PM CST**



**It is easy, sign up today!**

Scan or click the QR code to register for an informative and educational workshop session.



**These workshops will be virtual**

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## Financial Planning: Invest in Yourself

By taking a holistic view of financial needs, learn to make informed decisions and “Invest in Yourself” for a better financial future.

**June 3<sup>rd</sup>, 10<sup>th</sup>, and 17<sup>th</sup>, 2026, 12:00-1:00 PM CST**

## Retirement Income Planning

Learn how to create a retirement income strategy and manage the five common retirement risks.

**July 22<sup>nd</sup>, 2026, 12:00-1:00 PM CST**

## Retirement Tips for Every Age

Get your retirement right with 8 tips you can use right now.

**August 19<sup>th</sup>, 2026, 12:00-1:00 PM CST**

## Retirewise Workshop Series

From budgeting and tax strategies to determining investment options and how to create a will, there's something for everyone to learn.

**September 2<sup>nd</sup>, 9<sup>th</sup>, 16<sup>th</sup>, and 23<sup>rd</sup> 2026, 12:00-1:00 PM CST**

## Making Sense of the Roth: Is it Right for You?

For many, a Roth account is a good option. Learn about the Roth and find out if it makes sense for you.

**October 21<sup>st</sup>, 2026, 12:00-1:00 PM CST**

## Tax Strategies: The Basics and Beyond

Plan in a tax-efficient manner including diversification and how to lower your tax bill.

**November 18<sup>th</sup>, 2026, 12:00-1:00 PM CST**

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PlanSmart is a product of MetLife Consumer Services, Inc. (MCS). MCS administers the PlanSmart program and has arranged to have specially trained third party financial professionals offer financial education. The financial professionals providing financial education are not affiliated with MetLife but are providing the program under a service provider contract.

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## Countdown to Retirement: 5 Years to Go

This pre-retirement workshop equips you with the essential knowledge and tools needed to plan your next chapter. You'll receive guidance on income strategies, investment optimization, and healthcare planning for a smooth transition into retirement.

**December 2<sup>nd</sup>, 2026, 12:00-1:00 PM CST**



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