Caterpillar Inc.

is now offering the following financial education virtual workshops

Smart Money Moves

10 tips to set yourself up for financial success.

January 21st, 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 18th, 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 18th, 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 22nd, 2026, 12:00-1:00 PM CST

Estate Planning

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

May 20th, 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

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 3rd, 10th, and 17th, 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 22nd, 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 19th, 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 2nd, 9th, 16th, and 23rd 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 21st, 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 18th, 2026, 12:00-1:00 PM CST

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 2nd, 2026, 12:00-1:00 PM CST