



Financial Well-being

Education Catalog

2026



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Allowlisting

To ensure that employees can access MSA's financial education, please have your IT department allowlist msaclasses@mysecureadvantage.com and live@mysecureadvantage.com, as well as the vendors we use for our virtual classes. Click on the buttons below for their instructions. Our vendor(s) may be subject to change.

- Vendor 1
- Vendor 2
- Vendor 3

Engaging & Relatable

"Excellent instruction! [The presenter] did an amazing job making the material fun and engaging. Truly one of the best financial trainings I have attended."

– MSA Member

Order your next event!

Contact your Class Coordinator to get started.
classrequest@mysecureadvantage.com



Communications Guide & Calendar

Promote MSA by sharing flyers, videos,
and our live events!



Important

- Attendees must register individually to receive their unique access link and a recording link after the session.
- Do not share the registration links via a calendar invite.
- Events are hosted via Zoom. Just click the "**Launch Meeting**" button. If you are having trouble joining, please use the "**Join from Your Browser**" link that is below the Launch Meeting button on the confirmation page.

Education Days

How It Works

MSA can deliver classes virtually or present them in-person at your worksite. Either way, talk with us about various options to make the most of your education day. Here's what you need to know:

Scheduling

Contact us at msaclasses@mysecureadvantage.com to request your education day four to six weeks prior to your desired date(s).

Class Options

A maximum of three hours of formal instruction can be delivered during an 8-hour day to a single site. The same topic can be presented at multiple times, or two to three different topics can be offered. Please allow at least 30 minutes between classes. Many classes have 30-minute or 60-minute versions. See class descriptions for specifics.

Table Time

In addition to classes, the presenter can host a meet-and-greet table to allow employees to ask questions and get more information about their benefit.

Things to Keep in Mind

○ Customization

For customized presentations, eight weeks advance notice is required, and all materials must be finalized two weeks prior to the class date. Customizations could result in an additional charge. Speak to our Education Team about your unique needs.

○ Cancellation

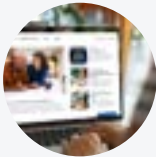
Our cancellation/change policy requires you to notify MSA at least seven (7) days prior to the date the event is scheduled. Cancellation or changes in schedule with less notice may affect ability to reschedule. (Notwithstanding anything to the contrary contained herein, MSA shall not be liable for any delays or failures in performance resulting from acts beyond its reasonable control including, without limitation, acts of God, terrorist acts, labor difficulties, or civil unrest.)

Classes & Details

To see class information, including the description, click on [Details](#)

Reach out to your Class Coordinator to discuss available promotional materials and related activities to help make your event a success.

Each class is reviewed annually to update stats and keep up with changes in legislation. Also, attendee survey feedback is reviewed and can drive changes to class content.



MSA Financial Well-being Program Overview* 30 minutes



What would change your life? Paying off debt and improving credit? Building a budget or planning for college or retirement? Did you know your employer provides you and your family access to MSA (My Secure Advantage®) – a comprehensive, customized financial well-being program?

If you feel uncertain about your finances or have specific goals to achieve, MSA Money Coaches can help you overcome roadblocks, consider options, and answer questions. Unbiased and judgment-free, our coaches don't work on commission or sell products. They are here to serve your best interests and help you achieve financial wellness in the unique ways that are important to you. In addition to coaching, MSA's holistic approach includes education and a digital platform.

Are you ready to reduce your financial stress and live your best life? Join this interactive event to learn more about your MSA benefit and how it can help you take your finances to the next level.

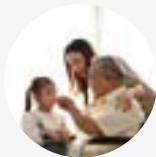
*This class is great for company leaders to help them understand the program and share it with their direct reports. It is equally beneficial to offer to your entire population to help get them engaged and on the way to reaching their financial goals.

**This class is only available as a virtual event. Not available on-site.



#Adulting: Surviving to Thriving

[Details](#)



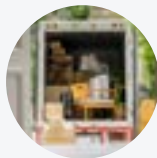
A Caregiver's Financial Guide

[Details](#)



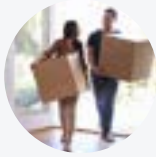
A Guide to Mortgage Basics

[Details](#)



A Guide to Selling Your Home

[Details](#)



A Guide to Smart Homebuying Decisions

[Details](#)



Balancing Your Financial & Emotional Well-being

[Details](#)

Key  Class available in Spanish

Order your next event!

Contact your Class Coordinator to get started.
classrequest@mysecureadvantage.com



Building Financial Resilience

[Details](#)



Building Wealth in the African-American Community

[Details](#)



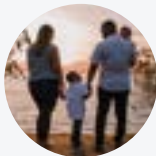
Dollars & Sense: A Guide to Budgeting

[Details](#)



Dollars & Sense: Juggling Financial Priorities

[Details](#)



Estate Planning: Financial Basics

[Details](#)



Family Finances: Planning for College 101

[Details](#)



Family Finances: Practical Money Tips for Parents

[Details](#)



Family Finances: Teaching Children Money Concepts

[Details](#)



Financial Resources for People with Disabilities

[Details](#)



Identity Theft: Prevention & Recovery Strategies

[Details](#)



Insurance Basics: Protecting Your Future & Assets

[Details](#)



Investing Basics: Growing Your Wealth

[Details](#)



Key  Class available in Spanish

Order your next event!

Contact your Class Coordinator to get started.
classrequest@mysecureadvantage.com



Investing Basics: Professionals vs. DIY

[Details](#)



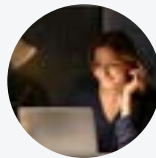
Investing Highlight: Digital Assets

[Details](#)



Investing with Confidence: Risks & Taxes

[Details](#)



Investing with Confidence: Your Long-Term Strategy

[Details](#)



Loans: A Comprehensive Guide

[Details](#)



Managing Financial Needs of Children & Aging Parents

[Details](#)



Mastering Mid-Career Finances

[Details](#)



Mastering Money Basics

[Details](#)



MSA's Keys to Financial HealthSM: Unlock Your Potential

[Details](#)



New Year, New You: Turning Goals into Reality

[Details](#)



Overcoming Debt & Achieving Financial Freedom

[Details](#)



Personal Finance: The Latino & Hispanic Communities

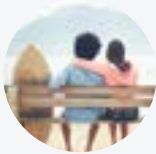
[Details](#)



Key Class available in Spanish

Order your next event!

Contact your Class Coordinator to get started.
classrequest@mysecureadvantage.com



Relationships & Money

Details



Retirement: Early Career Decisions

Details



Retirement: Late Career Decisions

Details



Retirement: Navigating Common Risks

Details



Retirement: Social Security Decisions

Details



Retirement: Understanding Medicare

Details



Smart Money Moves: Holiday Planning

Details



Smart Money Moves: Tips for Major Purchases

Details



Smart Tax Moves: Maximizing Employee Benefits

Details



Smart Tax Moves: The Benefits of HSAs & FSAs

Details



Smart Tax Moves: Understanding Opportunities

Details



Smart Tax Moves: Understanding Tax Returns

Details

Key  Class available in Spanish

Order your next event!

Contact your Class Coordinator to get started.
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The Financial Well-being Playbook

Details



The Student Loan Survival Guide

Details



Thriving in Challenging Economic Times

Details



Unlocking the Power of Your Credit

Details



Women & Money

Details

See the next page for **MSA's Keys to Financial HealthSM**.

Key  Class available in Spanish

MSA's Keys to Financial HealthSM

MSA has developed standards for financial health in five key areas. These workshops are overviews of each key area and provide education, tools, and action steps for each member's unique circumstances and learning style.

My Money: A Financial Health Workshop 60 minutes

Maintaining a budget brings a sense of empowerment, giving you control over your finances and the confidence to make informed financial decisions. If you're unsure of where your money is going or it seems like there's never enough, it can be challenging to feel in control. Take first steps toward the following:

- ✓ Develop your budget
- ✓ Track your expenses and income
- ✓ Achieve a positive monthly cash flow

By mastering the My Money Key, you can become intentional about your spending, ensuring your money goes toward the goals that matter most.



My Credit: A Financial Health Workshop 60 minutes

Good credit and manageable levels of debt open the door to financial freedom. A good credit score can potentially save you a significant amount in interest over your lifetime and keeping manageable levels of debt can help relieve financial stress. In this workshop, we'll walk through action steps like the following:

- ✓ Building a healthy credit score
- ✓ Eliminating credit card debt
- ✓ Improving your debt-to-income ratio

Discover how you can master the components of credit and debt, and feel the freedom that comes with using your money how you want to.



My Protection: A Financial Health Workshop 60 minutes

Having financial protection provides peace of mind, ensuring that you are prepared for unexpected expenses and can maintain stability in times of uncertainty. Life is full of twists and turns, and planning prepares you for whatever comes your way. Join us to work on action steps that will help you:

- ✓ Build three months of emergency savings
- ✓ Select the appropriate amount of insurance
- ✓ Create a will or a trust
- ✓ Protect your credit

Mastering the My Protection Key can give you peace of mind that you and your loved ones are better protected for life's challenges.





My Retirement: A Financial Health Workshop 60 minutes

Good retirement planning instills confidence, assuring that you will be financially stable and prepared for the future. Don't leave your future up to chance. Invest in yourself and live the life you want in retirement. We will walk through action steps you can take to:

- ✓ Create your retirement plan
- ✓ Put your retirement plan into action

Mastering the My Retirement Key can ensure you are on the right track to the retirement you envision.



My Game Plan: A Financial Health Workshop 60 minutes

Setting clear goals can build momentum, propelling you forward with a sense of purpose and driving continuous progress toward your achievements. Aspiring to reach your goals can be daunting sometimes. Learn how to create an action plan, so you can set yourself up for success with things like the following:

- ✓ Investing goals
- ✓ Savings goals
- ✓ Family goals
- ✓ Any other hopes and dreams

Mastering the My Game Plan Key helps give you the momentum to see your dreams turn into reality.

Order your next event!

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