

## 2023 VES Campaign

### Objective:

- To continue to provide best-in-class, no-charge, monthly financial education webinars to our full-service plans and participants. The VES (Virtual Education Series) webinars are non-plan specific.

### Schedule:

- The frequency will continue to be six webinars per month.
- The webinars will continue to be the first Friday and following Monday of each month, with the exception of months that have a holiday falling on those dates.
- Registration links will be updated with the next quarter's webinars the Tuesday after the previous quarter's sessions have concluded.

### 2023 Enhancements:

- The "On-Demand" feature has been extended from 30 days to 60 days.
- New topic of "Estate Planning (Leaving a legacy)" available for July 2023.

### VES Spanish sessions (2023):

- Spanish sessions for 2023 will take place on a Quarterly Basis (4x per year) in the second month of each quarter.
- Topics will be TDI, PoI, FF & RI(FS) and will be added to that month's registration link choices.
- OnDemand Spanish sessions will have the same 60-day availability after the live webinar date.
- **The 2023 Spanish Only VES link will be for JUST these webinars:** [https://webinars.on24.com/Vanguard\\_IIG/VESesp](https://webinars.on24.com/Vanguard_IIG/VESesp)

### Additional Points:

- **All six webinars per month are still recorded and available for those folks that registered for that specific session, but the active registration link will only carry over ONE of those sessions for future OnDemand new registrations & viewings**
- **ALL monthly webinars will be included within the Vanity link(s) below for the 2023 VES series:**
  - o [https://webinars.on24.com/Vanguard\\_IIG/VES2023](https://webinars.on24.com/Vanguard_IIG/VES2023)
- These same topics can also be utilized to conduct virtual education (webinars) for both IIO and VRPA audiences, but must be done in separate sessions: Those participants cannot be included within this campaign as all of the peripheral communications (emails, registration links & on-screen content and resources) are dedicated to Full Service participants.
- Posters (soft copy .pdf format) will be available through Seismic.
- "Push" email invitation text will be available through Seismic.
- Quarterly push email opt-in will continue to be available for CCs of up market plans and RMs of down market plans.
- Communication regarding the opt-in period and process will come from ECS on a quarterly basis.

# 2023 Vanguard VES Webinars (VES) - Quarterly Activation

Topic:	Dates:	Eastern	Central	Mountain	Arizona	Pacific
<b>Jan: Financial Freedom</b> Registrations open Dec. 6, 2022	Friday, January 6	9 AM, 12 PM & 3 PM	8 AM, 11 AM & 2 PM	7 AM, 10 AM & 1 PM	7 AM, 10 AM & 1 PM	6 AM, 9 AM & 12PM
	Monday, January 9	2 PM, 5 PM & 8 PM	1 PM, 4 PM & 7 PM	12PM, 3 PM & 6 PM	12PM, 3 PM & 6 PM	11 AM, 2 PM & 5 PM
<b>Feb: Target Date Investments</b> Registrations open Dec. 6, 2022	Friday, February 3	9 AM, 12 PM & 3 PM	8 AM, 11 AM & 2 PM	7 AM, 10 AM & 1 PM	7 AM, 10 AM & 1 PM	6 AM, 9 AM & 12PM
	Monday, February 6	2 PM, 5 PM & 8 PM	1 PM, 4 PM & 7 PM	12PM, 3 PM & 6 PM	12PM, 3 PM & 6 PM	11 AM, 2 PM & 5 PM
<b>Mar: Protect your Future</b> Registrations open Dec. 6, 2022	Friday, March 3	9 AM, 12 PM & 3 PM	8 AM, 11 AM & 2 PM	7 AM, 10 AM & 1 PM	7 AM, 10 AM & 1 PM	6 AM, 9 AM & 12PM
	Monday, March 6	2 PM, 5 PM & 8 PM	1 PM, 4 PM & 7 PM	12PM, 3 PM & 6 PM	12PM, 3 PM & 6 PM	11 AM, 2 PM & 5 PM
<b>Apr: Timeline to Retirement</b> Registrations open Mar 7, 2023	Friday, April 14	9 AM, 12 PM & 3 PM	8 AM, 11 AM & 2 PM	7 AM, 10 AM & 1 PM	6 AM, 9 AM & 12PM	6 AM, 9 AM & 12PM
	Monday, April 17	2 PM, 5 PM & 8 PM	1 PM, 4 PM & 7 PM	12PM, 3 PM & 6 PM	11 AM, 2 PM & 5 PM	11 AM, 2 PM & 5 PM
<b>May: Principles of Investing</b> Registrations open Mar 7, 2023	Friday, May 5	9 AM, 12 PM & 3 PM	8 AM, 11 AM & 2 PM	7 AM, 10 AM & 1 PM	6 AM, 9 AM & 12PM	6 AM, 9 AM & 12PM
	Monday, May 8	2 PM, 5 PM & 8 PM	1 PM, 4 PM & 7 PM	12PM, 3 PM & 6 PM	11 AM, 2 PM & 5 PM	11 AM, 2 PM & 5 PM
<b>June: Saving for College/529</b> Registrations open Mar 7, 2023	Friday, June 2	9 AM, 12 PM & 3 PM	8 AM, 11 AM & 2 PM	7 AM, 10 AM & 1 PM	6 AM, 9 AM & 12PM	6 AM, 9 AM & 12PM
	Monday, June 5	2 PM, 5 PM & 8 PM	1 PM, 4 PM & 7 PM	12PM, 3 PM & 6 PM	11 AM, 2 PM & 5 PM	11 AM, 2 PM & 5 PM
<b>July: NEW Estate Planning (Leaving a legacy)</b> Registrations open June 6, 2023	Friday, July 7	9 AM, 12 PM & 3 PM	8 AM, 11 AM & 2 PM	7 AM, 10 AM & 1 PM	6 AM, 9 AM & 12PM	6 AM, 9 AM & 12PM
	Monday, July 10	2 PM, 5 PM & 8 PM	1 PM, 4 PM & 7 PM	12PM, 3 PM & 6 PM	11 AM, 2 PM & 5 PM	11 AM, 2 PM & 5 PM
<b>Aug: Financial Freedom</b> Registrations open June 6, 2023	Friday, August 4	9 AM, 12 PM & 3 PM	8 AM, 11 AM & 2 PM	7 AM, 10 AM & 1 PM	6 AM, 9 AM & 12PM	6 AM, 9 AM & 12PM
	Monday, August 7	2 PM, 5 PM & 8 PM	1 PM, 4 PM & 7 PM	12PM, 3 PM & 6 PM	11 AM, 2 PM & 5 PM	11 AM, 2 PM & 5 PM
<b>Sept: Getting on Track - RRT</b> Registrations open June 6, 2023	Friday, September 8	9 AM, 12 PM & 3 PM	8 AM, 11 AM & 2 PM	7 AM, 10 AM & 1 PM	6 AM, 9 AM & 12PM	6 AM, 9 AM & 12PM
	Monday, September 11	2 PM, 5 PM & 8 PM	1 PM, 4 PM & 7 PM	12PM, 3 PM & 6 PM	11 AM, 2 PM & 5 PM	11 AM, 2 PM & 5 PM
<b>Oct: Health Savings Accounts HSAs</b> Registrations open Sept 12, 2023	Friday, October 6	9 AM, 12 PM & 3 PM	8 AM, 11 AM & 2 PM	7 AM, 10 AM & 1 PM	6 AM, 9 AM & 12PM	6 AM, 9 AM & 12PM
	Monday, October 9	2 PM, 5 PM & 8 PM	1 PM, 4 PM & 7 PM	12PM, 3 PM & 6 PM	11 AM, 2 PM & 5 PM	11 AM, 2 PM & 5 PM
<b>Nov: Retirement Income (Forever Saturday)</b> Registrations open Sept 12, 2023	Friday, November 3	9 AM, 12 PM & 3 PM	8 AM, 11 AM & 2 PM	7 AM, 10 AM & 1 PM	6 AM, 9 AM & 12PM	6 AM, 9 AM & 12PM
	Monday, November 6	2 PM, 5 PM & 8 PM	1 PM, 4 PM & 7 PM	12PM, 3 PM & 6 PM	12PM, 3 PM & 6 PM	11 AM, 2 PM & 5 PM
<b>Dec: Timeline to Retirement</b> Registrations open Sept 12, 2023	Friday, December 1	9 AM, 12 PM & 3 PM	8 AM, 11 AM & 2 PM	7 AM, 10 AM & 1 PM	7 AM, 10 AM & 1 PM	6 AM, 9 AM & 12PM
	Monday, December 4	2 PM, 5 PM & 8 PM	1 PM, 4 PM & 7 PM	12PM, 3 PM & 6 PM	12PM, 3 PM & 6 PM	11 AM, 2 PM & 5 PM

VES Spanish Quarterly Webinars: 2<sup>nd</sup> month of each quarter, same topic. Monday @ 3pm Eastern

Spanish specific registration link: [https://webinars.on24.com/Vanguard\\_IIG/VESesp](https://webinars.on24.com/Vanguard_IIG/VESesp)