PNC

PNC WorkPlace Banking

At PNC Bank, we want to help you make informed financial decisions every day, and we are dedicated to helping give you the confidence, information and tools you need to make informed financial decisions that help you achieve your goals.

PNC WorkPlace Banking is committed to supporting your financial well-being by providing convenient on-site seminars and workshops on topics such as:

CAREER LIFESTAGES & FINANCE SERIES

Early Career: Establishing Yourself

New workers and recent graduates can learn how to choose benefits, build a budget that accommodates rent and commutes, and understand how and why to start investing to grow money for retirement.

Middle Career: Expanding Your Household

Learn about how to manage credit and safeguard against identity theft, find the right mortgage to buy a house, and care for older relatives.

Later Career: Planning Your Retirement

Learn more about how to define retirement goals, explore different retirement plans, maximize money growth by choosing different strategies, and identify any potential risks or problems.

WORKPLACE BANKING SMART BORROWING SERIES

Learn about all the options available to you so you can choose the right borrowing solution to meet your needs. These modules cover a variety of topics including understanding types of borrowing vehicles, knowing what to look for when shopping for a loan, and recognizing dishonest lending practices.

MONEY MATTERS

Learn how to manage money by preparing a personal spending plan and identifying ways to decrease spending and help increase income, track financial habits and build a budget, and create a plan to help achieve your financial goals.

RAISING MONEY-SMART KIDS

By teaching your children about money at an early age, you can help them develop good financial habits – ones they may carry with them for the rest of their lives. Learn which money skills a child should master before leaving home and how to teach young children to save toward a goal.

PNC ACHIEVEMENT SESSIONS

You can also take advantage of our commitment to providing financial education at your convenience, online at http://pnc.com/achievementsessions. There you'll find real-world financial experts who cover topics on saving, spending, borrowing, and investing, as well as quizzes and challenges to help you take action and be more confident in your financial decisions.

See reverse side for retirement and additional topics.

LEARN MORE

Interested in one or more of these workshops or seminars conducted at your workplace?
Let your local PNC WorkPlace Banker know: Tara Phillips

EQUAL HOUSING LENDER

Seminars provided for informational purposes only and do not provide legal, financial or accounting advice. Individuals should consult their own advisor for specific advice concerning their individual situation.

Important Investor Information: Brokerage and insurance products are:

Not FDIC Insured • Not Bank Guaranteed • Not A Deposit
Not Insured By Any Federal Agency • May Lose Value

PNC WORKPLACE BANKING
Educational Seminars

NAME: _____

ORGANIZATION: _____

E-MAIL: _____

TELEPHONE: _____

Please mark the topics that would be of interest to you.

FINANCIAL EDUCATION SEMINARS:

- ☐ Career Lifestages & Finance Series
- ☐ WorkPlace Banking Smart Borrowing Series
- ☐ Money Matters
- ☐ Raising Money-Smart Kids
- ☐ 5 Threats To Your Retirement*
- ☐ The Role Of Insurance In Your Financial Plan*
- ☐ Retirement Plan Rollover*
- ☐ Social Security*
- ☐ Women And Investing*
- ☐ Retirement Planning*
- ☐ Pay Yourself First**
- ☐ Keep It Safe**
- ☐ To Your Credit**
- ☐ Your Own Home**

OTHER:

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**Securities products, brokerage services and managed account advisory services are offered by PNC Investments LLC, a registered broker-dealer and a registered investment adviser and member FINRA and SIPC. Annuities and other insurance products are offered through PNC Insurance Services, LLC, a licensed insurance agency. PNC Investments and PNC Insurance Services do not provide legal, tax or accounting advice.*

***FDIC materials*

PNC

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At PNC, we want to help you make informed financial decisions every day. That's why we conveniently offer a variety of seminars and workshops, right at your workplace.

RETIREMENT AND FINANCIAL PLANNING

PNC offers a variety of seminars on topics such as retirement planning, education planning, insurance and financial planning. Let your WorkPlace banker know what you are interested in and they will work with a PNC professional to set up an on-site seminar to meet your needs.

5 THREATS TO YOUR RETIREMENT

Retirement planning is more complicated than it's ever been before. This seminar identifies five main threats to a successful retirement; knowing the risks allows you to better prepare for them.

THE ROLE OF INSURANCE IN YOUR FINANCIAL PLAN

You might be saving for retirement through a 401(k) plan or an IRA. But have you considered what might happen if you were unable to keep earning enough to fund your plans? Life insurance may provide for your family if something happens to you before you reach your goals.

RETIREMENT PLAN ROLLOVER

Have you ever changed jobs – and left a 401(k) plan behind? Are you getting ready to change jobs or retire? If so, you have some important decisions to make regarding your accumulated assets, and there are a number of options to consider. Making smart choices today can make all the difference down the road when it comes to your retirement.

SOCIAL SECURITY

This seminar identifies the current rules surrounding Social Security, as well as specific collection strategies geared towards helping you make the most of your benefits.

WOMEN AND INVESTING

When it comes to investing for retirement, women face a unique set of challenges their male colleagues often do not. This seminar is designed to highlight the challenges women face when investing for retirement, and offers options to mitigate the impact these challenges pose.

RETIREMENT PLANNING

Everyone has a unique vision of what their retirement is going to look like. However, achieving that vision takes careful planning and dedication. The Retirement Planning seminar offers you the knowledge and tools that can help you take crucial steps towards achieving the retirement you're envisioning.

FDIC MATERIALS

PAY YOURSELF FIRST

Saving effectively requires understanding savings options and developing savings goals. Whether you want to take a vacation, buy a new home or car, pay for your child's college tuition, or retire, effective savings practice can help make it all possible.

KEEP IT SAFE

Your relationship with your bank is only the beginning of your available resources for financial security. Become familiar with financial concerns like identity theft and about preparing for the unexpected. Learn how your careful planning can help you through financial emergencies.

TO YOUR CREDIT

How much do you really know about credit reports and credit history? Learn why credit is important, as well as how to order, read and analyze your credit report. Discover how you can build or improve your credit history and use credit even more effectively as you strive to achieve your financial goals.

YOUR OWN HOME

Learn the advantages and disadvantages of renting versus owning a home. Identify questions to ask to determine readiness to buy a home, identify basic terms and required disclosures used in mortgage transaction. Identify predatory lending practices and loan scams.

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