

WEBINAR SERIES

Getting Better with Gallagher Financial Wellbeing

Join Gallagher Retirement Plan Consultants for the 2024 webinar series, and get a little better with your finances each month.

| Date | Topic |
|--------------|---|
| January 17 | Basic Budgeting & Money Management |
| February 21 | Retirement Account Basics: Your Employer Plan & Beyond |
| February 29 | Executive Benefits: Leveraging Your Workplace Benefits, Life & Disability Insurance |
| March 20 | Prioritizing Your Debt Goals: What Debt to Pay Off First |
| April 17 | Navigating the Financial Impact of Life Events: Home Purchases |
| May 15 | Navigating the Financial Impact of Life Events: What to Expect When Expecting |
| June 12 | Navigating the Financial Impact of Life Events: Whole Family Financial Plan |
| July 17 | When Do I Need a Professional Financial Planner & Estate Plan? |
| August 21 | Preparing to Retire |
| September 18 | Your Employer Benefits & You (Open Enrollment Discussion) |
| September 26 | High-Net-Worth Employees: Navigating & Maximizing Benefits |
| October 16 | The Election & Its Impact on Your Wallet |
| November 20 | Investing 101 |
| December 18 | Your Financial Review for the Year |

AJG.com **The Gallagher Way.** Since 1927.

Gallagher Fiduciary Advisors, LLC ("GFA") is an SEC Registered Investment Advisor that provides retirement, investment advisory, discretionary/named and independent fiduciary services. GFA is a limited liability company with Gallagher Benefit Services, Inc. as its single member. GFA may pay referral fees or other remuneration to employees of AJG or its affiliates or to independent contractors; such payments do not change our fee. Neither Arthur J. Gallagher & Co., GFA, their affiliates nor representatives provide accounting, legal or tax advice.

Securities may be offered through Triad Advisors, LLC ("Triad"), member FINRA/SIPC. Triad is separately owned and other entities and/or marketing names, products or services referenced here are independent of Triad. Neither Triad nor their affiliates provide accounting, legal or tax advice. GFA/Triad CD (6209013)(exp012026)

Registration of an investment adviser does not imply any specific level of skill or training and does not constitute an endorsement of the firm by the Commission.

© 2024 Arthur J. Gallagher & Co.



Scan the QR code or click below to register

REGISTER NOW



Insurance | Risk Management | Consulting



Gallagher

Insurance | Risk Management | Consulting

Retirement Plan Consulting Services

Etrailer Corporate Employee Profit Sharing Plan & Trust Client Contact List November 1, 2023

Michelle Lamacchio, CPFA

Retirement Plan Consultant, Investment Advisor Representative
2600 S. Telegraph Road, Suite 100, Bloomfield Hills, MI 48302
D 248.646.1126
M 734.717.8152
Michelle_Lamacchio@ajg.com

Scott Koenigsknecht

Area Vice President, Registered Representative
2600 S. Telegraph Rd., Suite 100, Bloomfield Hills, MI 48302
M 248.882.4483
D 248.430.2785
Scott_Koenigsknecht@ajg.com

Amalia "Molly" Beer, MBA

Area Executive Vice President, Investment Advisor Representative
2850 Golf Road, Rolling Meadows, IL 60008
D 312.416.0477
M 630.661.4954
Molly_Beer@ajg.com