

# Employee education series

## 2026 calendar

We understand that providing employees with access to employee education pertaining to retirement is an important fiduciary obligation. To supplement the education tools and resources made available by your recordkeeper, we have created a monthly series of education topics that will be beneficial to your employee population.

On a monthly basis we send our clients communications on investing, saving, financial wellness, retiring or other opportunities to help their employees manage their finances and protect their nest egg.



You can access our library of participant education articles at [USICG Employee Learning Station](#).

### 2026 EMPLOYEE EDUCATION SERIES

<b>JANUARY</b> Retirement plan assessment	<b>JULY</b> Social Security timeline
<b>FEBRUARY</b> Impact of inflation	<b>AUGUST</b> Retirement plan distribution options
<b>MARCH</b> Tax efficient investing strategies	<b>SEPTEMBER</b> Borrowing considerations
<b>APRIL</b> Power of compound interest	<b>OCTOBER</b> Long-term strategy for investing
<b>MAY</b> Estate planning – Digital assets	<b>NOVEMBER</b> Estate planning – Trusts
<b>JUNE</b> Target date funds 101	<b>DECEMBER</b> Holiday stress tips

### How USI Consulting Group can help

USI Consulting Group (USICG) has the experience to help employers develop and implement successful education and communication programs for employees to improve retirement plan participation and deferral rates. For more information about how USICG supports your employees' retirement education, please contact your USICG Consultant directly or reach out to us at [information@usicg.com](mailto:information@usicg.com).

The Learning Station Website and Employee Education materials provided by USI Consulting Group (USICG) are resources intended to compliment but not replace current employee education that is offered by your Retirement Plan Service Provider. Please continue to work with your current Service Provider as a primary means for providing employee education communications and education meetings for your employees. Please reach out to your USICG representative if you require additional assistance in coordinating education with your Service Provider.

This information is provided solely for educational purposes and is not to be construed as investment, legal or tax advice. Prior to acting on this information, we recommend that you seek independent advice specific to your situation from a qualified investment/legal/tax professional.