T.Rowe Price®
INVEST WITH CONFIDENCE

Financial Literacy Library

Resources to guide investors through various lifestages

We've collected the best of what T. Rowe Price has to offer to end investors and brought it together here for you. Our financial literacy library is a robust offering of topics addressing the specific needs of investors based on their lifestage.

PRESENTATIONS

6 G's of Money I Wish I Had Known When I Was Growing Up: Provides inspirational financial life lessons in a way designed to engage young adults.

Achieving Financial Goals: Helps investors understand the steps needed to successfully accomplish key life milestones, including retirement, college savings, establishing an emergency fund, managing debt, and handling competing priorities.

Building Generational Wealth: Provides best practices of successful families, helping you more effectively communicate and educate the next generation on financial matters.

Finding and Funding Your "Why": Inspires women investors to define their role in the financial planning process by understanding and communicating their "why" in life.

How Successful Families Approach Money: Explores family dynamics around finances, providing insights into why it can be difficult to connect. We also share three keys to less stress when communicating with family members about money.

An Intro to ESG: Seeing the World Through a Different Lens: Helps to better understand environmental, social and governance (ESG) investing, including different approaches to ESG investing and how investors of all generations can find common ground and understanding.

Planning for Retirement Health Care Costs: Provides an overview of the health care landscape, including a high-level overview of health care costs in retirement and Medicare.

Retirement Ready: Helps investors understand where they are on their journey toward saving enough for retirement, by answering the common questions of: Do I have enough? Am I on track? How much do I need? When can I retire?

Retirement Spending: Revolutionize Your Thinking: Provides insights into how retirees think about spending in retirement, including the behaviors and motivations of spenders versus savers.

Social Security Simplified: Simplifies Social Security by providing information on the benefits people can expect to receive and different scenarios to consider when claiming benefits.

Speaking of Markets: Reinforces the relationship between financial professionals and their clients, helping them coordinate effective investment strategies to weather the up and downs of unpredictable markets.

Visualize Retirement: Make Your Vision a Reality: Walks pre retirees through a three-step process to: (1) create their retirement vision, (2) build a personalized action plan to bring clarity to their vision, and (3) assess their retirement spending needs to help them work toward making their vision a reality.

TOPICS AVAILABLE TO ENGAGE WITH INVESTORS

PRESENTATIONS BY LIFESTAGE	**Early Career (Ages 20–34)** For these investors, retirement may seem far off, but it's still important for them to start saving. You can help by providing education on debt, mortgages, and family finances, putting them on a firm footing as they begin to accumulate wealth.	**Mid-Career (Ages 35–49)** Many individuals in this life phase are now supporting children, and for some, also elderly parents. You can guide them through handling increased financial obligations, while helping them build net worth as their salary and human capital rises.	**Preretiree (Ages 50–64)** Preretirees need to prepare holistically for the next stage of life. You can help them estimate a budget, establish an overall plan, and consider the emotional aspects of retirement.	**Retiree (Ages 65+)** Retirees want to make sure their income lasts through retirement. You can help them manage the financial and emotional aspects of their retirement.
6 G's of Money I Wish I Had Known When I was Growing Up	✓	✓		
Achieving Financial Goals	✓	✓		
Building Generational Wealth	✓	✓	✓	✓
Finding and Funding Your Why	✓	✓	✓	✓
How Successful Families Approach Money	✓	✓	✓	✓
An Intro to ESG: Seeing the World Through a Different Lens	✓	✓	✓	✓
Planning for Retirement Health Care Costs	✓	✓	✓	
Retirement Ready			✓	✓
Retirement Spending: Revolutionize Your Thinking		✓	✓	✓
Social Security Simplified			✓	✓
Speaking of Markets	✓	✓	✓	✓
Visualize Retirement: Make Your Vision a Reality		✓	✓	✓

Talk with your T. Rowe Price representative or financial professional to learn more about available resources.

This material is provided for informational purposes only, and is not intended to provide legal, tax, or investment advice. This material does not provide recommendations concerning investments, investment strategies or account types and is not intended to suggest any particular investment action is appropriate for you. Please consider your own circumstances before making an investment decision.

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