

Brought to you by Bank of America at Work®

Financial guidance for today and tomorrow



Ways to help you keep moving forward

Balancing living expenses with your saving and retirement goals is a challenge. Plus, there are the added expenses such as planning for kids' college expenses and dealing with unexpected healthcare bills.

What's the best way to move forward? How can you keep your planning on track for a comfortable future?

Merrill Edge® has developed a suite of helpful online workshops that cover everything from planning for college costs and aligning daily budgeting with investing goals, to preparing for retirement.

Visit bankofamerica.com/bankatwork for more information on retirement planning, or to schedule a conversation with a licensed Merrill Edge Financial Solutions Advisor™.

Investing in your future

Check out these helpful online videos and tools:



Advice & Guidance

[Balancing your competing goals](#) (11 mins)

How to balance investing for the future with managing day-to-day finances.

[Making choices about your Social Security](#) (14 mins)

Social Security basics, strategies to maximize benefits, how to apply for benefits.

[Women and wealth: Creating a strategy that works for you](#) (18 mins)

Strategies and tips for women to help improve their financial well-being.



Retirement Planning

[Reclaim your retirement](#) (8 mins)

Ways to help you get closer to your savings goals.

[Planning for health care costs in retirement](#) (17 mins)

Information on coverage options and preparing for a healthy retirement.

[Will you have enough to retire?](#)

See what you'll need – then start investing with Merrill Edge.



Education & Planning

[An education for them, a potential savings for you](#) (13 mins)

Understand your education funding options and choose funding strategies.

[Saving for college: 5 strategies for parents](#)

A planning guide for your child's education.

[How much will you need to cover the costs of college?](#)

Our Merrill Edge® College Planning Tool will help you estimate the future costs of tuition and other college expenses at your favorite state or private college.

For more information, you can speak to a **Merrill Edge Financial Solutions Advisor™** to help you with one-on-one guidance at **888.609.4650**, Monday through Friday, 8 a.m. - 8 p.m. Eastern, and in select Bank of America banking centers around the country. Or visit bankofamerica.com/bankatwork.

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Investment products:

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