

2024 Financial Wellness Program

2023 was a stellar year for our Financial Wellness Program, offering over 49 sessions this year and offering new topics as we see issues affecting our members and our neighbors in the community. Look for a new brochure in your December 2023 statement.

This year proved to be a very concerning year for cybercrime and identity theft. It was a daily occurrence in the news as huge corporations were digitally attacked and customer data stolen, and on a more “down home” related front, we saw an increase of fraud happening to our own members with a loss of funds. This encouraged us to search for high-quality information for members on how to protect themselves, their accounts and their digital devices. With the video and materials from retired FBI Special Agent Jeff Lanza, we were able to present a webinar and in-person sessions to help our members and neighbors guard their information, devices and data.

Another topic that seemed to be of potential interest is a session on what happens when you lose someone in your life. This helped us create “Final Wishes Conversations - Facts You Should Consider: A Discussion with a Funeral Director & SnoCope’s Branch Manager”. A delicate topic without a doubt, but one that needs to be had and we found just the person to help us do that for our members and neighbors. To add to the discussion, we included our Branch Manager, Josey, to talk about what we, as a financial institution, need in the event of a death to help the family.

What a year! We have the schedule for 2024 ready to go and we’ve added our new sessions as permanent topics. Below are the dates for 2024, you can sign up now for any of them, just visit the [SnoCope website](#) and go to [Financial Wellness](#). You can watch via computer or your device or join us at the branch, just call Member Services.

- 1/17/24 PERS Washington St. Retirement Plan
- 2/14/24 Social Security Planning
- 3/20/24 Tax Planning Thru Retirement Stages
- 4/17/24 Transitioning to Medicare
- 5/7/24 Fraud, Identity Theft & Cyber Security
- 5/15/24 Preparing for Retirement
- 6/19/24 PERS Washington St. Retirement Plan
- 7/10/24 Healthcare in Retirement
- 8/21/24 Savvy Social Security
- 9/5/24 Fraud, Identity Theft & Cyber Security
- 9/18/24 Understanding Life Insurance
- 10/16/24 Wealth Transfer Planning
- 10/29/24 Final Wishes Conversations
- 11/20/24 Savvy IRA Planning

If you have any questions about anything related to the Financial Wellness Program, please call Marketing Director, Tracey Johnson at 425.405.9983 or email at tracey@snocope.org.