



Lesson Plan Calendar

Welcome to the BPAS University Lesson Plan!

We have designed this resource with your convenience in mind. Each month of the year has been given a theme and offers links to tools, flyers, and videos that you can choose from and easily share with Plan Sponsors and Participants. Select all, or just a few to send monthly or quarterly in your communications.

Each of the handouts listed within the Lesson Plan can be found in the [BPAS Roadways Partner Toolbox](#), the code is listed next to it for an easy search. The videos are readily accessible at BPAS University, u.bpas.com. We hope that this resource will provide easy access to the variety of materials that BPAS has to offer, and novel offerings for your plan constituents on a regular basis.



Why You Should Consider Implementing a Lesson Plan Strategy




By proactively establishing a participant education strategy, you can distinguish yourself from your peers while building a stronger relationship with your plan sponsor and participants. Some potential benefits of a pre-established education strategy include:

- Provides consistency with services detailed in the plan's 408(b)(2) notice
- Establishes a proactive action plan to address timely and relevant topics
- Keep participants engaged throughout the year
- Develops a stronger relationship with the participants, which may provide you with additional investment opportunities in the future.
- Higher plan participant and plan sponsor satisfaction may result in longer relationships and/or less service provider requests for proposals
- Delivers additional data/talking points for plan sponsor reviews, including effectiveness of communication methods, identifying targeted communications and more

Want to outsource an education strategy? Contact TrustSales@bpas.com to learn more about our Custom Education Services options.



How to Use the Lesson Plan


- Review the monthly content and decide what is appropriate for your plan. You may decide to send just one item out or all of them, the choice is yours!
-  Handouts can be found in the [BPAS Roadways Partner Toolbox](#), the code is listed next to it for an easy search.
-  Videos are readily accessible at BPAS University, u.bpas.com.
-  Web tools and resources are also available at BPAS University, u.bpas.com
- Determine the best way to distribute: will you email the Plan Sponsor who will then forward it on? Or, will you directly email the participants? If you're sending directly to participants, you may want to establish a blast email account to assist.
- What education have you scheduled or do you have planned? Be sure to notate your on-site or virtual presentations as well as any other communications you have planned.
- Mix and Match! The monthly topics are suggestions only, to aid you in planning educational topics. As all content is readily available at BPAS University and the BPAS Roadways Partners Toolbox, you are free to craft a customized curriculum for your Plan Sponsor and Participants. Review the Toolbox and BPAS U regularly as new items are added.
- We created a Plan Sponsor friendly handout, the BPAS U Education Calendar, as a quick overview of the topics you may cover. Be sure to add your logo and contact information and share with the Plan Sponsor. No need to share this document, this is just for your reference!





Lesson Plan Calendar

January

New Years Resolutions


 [Importance of Saving Early Video](#)


 Make the Most of Your 401(k) (J9)

 Participant Website Map (J12)

February

Show Your Future Some Love


 [Increasing Your Contributions Video](#)


 Encouraging Incoming Rollovers (J5)

March

Preparing for Tax Season

 [Savers Credit Video](#)

 [Pre-tax and Roth Features Video](#)




 [Pre-Tax and Roth Calculator](#)



Lesson Plan Calendar



April

Financial Literacy Month and Earth Day

-  [Financial Wellness Center Video](#)
-  [Journey to 10 Times Pay](#)
-  [Go Green Video](#)




May

Graduation

-  [Download the BPAS University app](#)
-  [Student Loans: Consolidation and Refinancing video](#)

June

Mid-Year




-  [Rebalancing Your Account Video](#)
-  [Asset Allocation Video](#)
-  [Risk-Tolerance Quiz](#)



Lesson Plan Calendar




July

Financial Freedom

-  [Organizing Your Finances Tool](#)
-  [Mile Marker Tool](#)
-  Don't Miss the Boat Handout (J3 & J4)




August

Financial Awareness Day (August 14)

-  [Making a Financial Plan video](#)
-  [Making Good Financial Decisions Video](#)
-  [Financial Wellness Center Video](#)

September

National 401(k) Day (Friday after Labor Day)



-  [Workplace Retirement Plans Video](#)
-  [Retirement Plan FAQs](#)
-  [Retirement Plan Myths](#)



Lesson Plan Calendar




October

Spooky Season

-  Market Volatility Flyer
-  Strategies for Navigating a Turbulent Market Video




November

Open Enrollment

-  What is an HSA?
-  Health Savings Accounts Video
-  FSA FAQs

December

End of Year Check-In

-  Are You On Target Video
-  FSA Deadlines
-  HSA FAQs