Employee Workshops 2026

At BOK Financial, we recognize the diverse needs of today's workplace. Our tailored educational programs assist you in guiding your employees to maximize their benefits and achieve their goals. Amidst the daily demands for your employees' attention, we aim to collaborate with you in emphasizing the significance of retirement savings through their employee retirement plan.

Premier Services for our Record kept Plans

Digital Newsletter

Issued on a quarterly basis, our electronic newsletter includes articles, calculators, on-demand videos, and virtual meeting invitations. Addressing topics like saving, investing, retirement, financial wellness, and more, the newsletter is readily packaged for your employees and sent directly to their verified email address on Start Right.

Personal One on One Consultations

As a BOK Financial Start Right recordkeeping client, your employees qualify for complimentary, comprehensive, and customizable retirement and financial planning services. They will benefit from professional, personalized investment guidance, along with continuous communication and support, which can be accessed both onsite and virtually.

Personalized Enrollment Assistance

Do your employees need help enrolling in their retirement plan? We have got you covered! Your employees can call our Participant Services Group at 1-800-876-9557 for personalized support. A knowledgeable representative will guide them through each step—from accessing their account, to entering their contribution amounts, investment options, and beneficiary information. Please note that our PSG reps cannot give advice.

Learn it Live: Monthly Webinar Demos

We're excited to introduce a new monthly series of live, step-by-step demo webinars designed to help your employees get the most out of their retirement plan tools. Each month, employees can choose from a variety of live webinar topics offering step-by-step walkthroughs—covering how to navigate the Start Right website and how to complete key tasks like enrolling in the plan or updating beneficiary information. These interactive sessions allow employees to follow along, ask questions in real time, and make sure they're fully using the tools available to support their financial well-being.

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Getting Started Series: Enrollment

Getting participants started on the right foot is crucial. Our tutorials provide step-by-step guidance on the enrollment process. From setting up accounts to choosing investment options, these resources ensure that participants have solid foundation.

Customized Enrollment Presentations

With this workshop, employees will gain a clear understanding of how to enroll in the retirement plan. We'll cover everything from how the plan works, the advantages of participating, to selecting contribution amounts and investment options. Participants will also learn about key features such as company contributions, tax benefits, and available resources. By the end of the session, they'll be equipped to make informed choices and take confident steps toward securing their financial future.

Suggested Handout: New Employee Welcome Packet Customized Video: Upon request.
Check out the calendar on the Plan Sponsor Hub for the regularly scheduled webinars.

Video Series: Getting Started and Saving for the Future

We have created a "Welcome to your retirement plan" digital welcome packet for you to send to your new employees to help them enroll in the retirement plan that includes all the topics below. Ask your RM for a customized version!

On-Demand: Account Access & Online Enrollment
On-Demand: Investment Basics
On-Demand: Beneficiary Designations
On-Demand: How Much Should You Contribute?
On-Demand: Retirement Plan Contribution Types
On-Demand: Rollover Options

Traditional Pre-Tax or Roth? Which Contribution is Right for You?

In this workshop, your employees will learn the key differences between Pre-Tax and Roth contributions, including how each option affects your take-home pay, taxes now and in retirement, and long-term savings growth. We will break down the pros and cons of each approach to help them decide which strategy best fits their financial goals and retirement timeline.

Suggested Handouts: Pretax & Roth Contributions; How to Change Your Contribution
On-Demand Video: Retirement Plan Contribution Types

Stronger Tools. Stronger Retirement.

Kick off 2026 with confidence! Update Your Retirement Plan for 2026 Using Start Right: Smarter Tools. Stronger Retirement shows employees how to stay on track with the My RetireRight Planner, align their investments with the Asset Allocation Calculator, review performance and fees, update beneficiaries under Secure 2.0, compare allocations, and access helpful resources like fund fact sheets, Morningstar insights, videos, and calculators. It's a simple way to strengthen their strategy and start the year strong!

Suggested Handouts: How to Change Your Investments; Investment Fund Spectrum

Jump Start Your Financial Fitness for 2026

Getting financially back on track in 2026 starts the same way you build physical health—through small, consistent steps that add up over time. If you're looking to strengthen your employees' financial wellness but aren't sure where to begin, this presentation is a great starting point. It offers clear guidance, practical tools, and simple insights to help them make confident decisions and regain control of their financial path. Together, we'll explore strategies that support long-term stability and help build a stronger financial future.

Suggested Handouts: Financial Wellness Worksheet; Financial Wellness Quiz
On-Demand Video: Steps to Achieve Financial Wellness

How To Maximize Your Retirement Plan

The objective of this workshop is to equip your employees with valuable information and insights on optimizing their retirement plan. This includes details on contributions, investments, beneficiaries, loans, and distributions.

Suggested Handouts: Maximize Your Retirement Plan; Investment Fund Spectrum

My RetireRight Planner Demo

This workshop is designed to introduce your employees to the My RetireRight Planner located on the Home page of Start Right. This tool helps you monitor your progress toward your retirement goals and highlights any potential "gap"—the difference between what you will need for retirement and what you have already saved.

Financial Wellness: Tools for Participants

A financially well participant is a more engaged participant. Our financial wellness tools help participants improve their overall financial health. From budgeting guides to debt management tips, participants can access resources to help them develop health financial habits.

Basics of Financial Wellness

This workshop covers the core elements of financial wellness, including smart strategies for managing debt, building a budget, saving for short and long-term goals, and protecting what matters most. Whether you are just getting started or looking to strengthen your financial foundation, you will leave with practical tips and tools to take control of your money with confidence.

Suggested Handouts: Financial Wellness Worksheet; Financial Wellness Quiz
On-Demand Video: Steps to Achieve Financial Wellness

Money in Motion: Instructions for Participants

Help participants make informed financial decisions with our guides for money moves. From rollovers and distributions to loans and conversions, we provide clear instructions so that participants can confidently take the necessary steps to maximize their retirement savings.

Plan Conversion or New Fund Implementation

This workshop will furnish employees with details on the transition of their retirement plan account to BOK Financial Start Right. It will highlight important dates, actionable steps before and after the conversion, and introduce new tools and resources available on the Start Right website and mobile app.

Rollovers: What to do when You've Changed Jobs and Left Your Retirement Plan Behind

This workshop will walk you through your options for overseeing a retirement plan after changing jobs, including rolling it over to an IRA, moving it to a new employer's plan, or leaving it where it is. You will learn the pros and cons of each choice, how to avoid unnecessary taxes or penalties, and how to keep your savings working toward your long-term goals.

Suggested Handouts: Rollover Options On-Demand Video: Rollover Options

Impact of Taking a Loan

This workshop explores the impact of taking a loan from your 401(k), including how it can affect your retirement savings and long-term goals. You will learn about alternative options to consider, along with the pros and cons of each approach—helping you make informed decisions when facing financial needs.

Suggested Handouts: Hazardous to your Wealth; Loans Can Be Costly On-Demand Video: Impact of Taking a Loan

Investing Basics: Tutorials for Participants

Equip your participants with resources to make sound investment decisions. Our tutorials cover key strategies to help participants understand risk tolerance, asset allocation, and diversification. With this knowledge, participants can make choices that align with their retirement goals.

Investing for Beginners: Investing Basics inside your Retirement Plan

This workshop introduces the core concepts of investing within your 401(k) plan, including how compounding can grow your savings over time, the role of different asset classes, and the importance of diversification. You'll also learn about rebalancing your portfolio to stay aligned with your goals and how to assess your personal risk tolerance to make confident investment choices.

Suggested Handouts: Investor Profile; How to Change Your Investments; Investment Fund Spectrum
On-Demand Video: Investment Basics

Navigating Market Volatility

Market ups and downs are normal, but your retirement plan is built for the long term. This session will show you how to stay focused on your goals, maintain a diversified investment mix, and avoid emotional decisions during market swings—helping you make confident choices even in uncertain times.

Suggested Handouts: Survival Strategies for Market Volatility; How to Change Your Investments; Investment Fund Spectrum

Preparing for Retirement Series

This presentation series is designed to help employees prepare for retirement with confidence. It covers every major aspect—from understanding their retirement plan and investment strategies to managing taxes, Social Security, healthcare, and income planning. They will also learn how to build a sustainable distribution strategy, explore estate planning essentials, and consider lifestyle choices that support a fulfilling retirement.

Pre-Retirement Strategies

This 2-hour workshop will walk your employees through key actions to take 10, 5, and 1 year before retirement to help them retire with confidence. They will learn how to coordinate Social Security with other income sources, minimize taxes, choose the right Medicare plan, and set up a distribution strategy to ensure their money lasts. We will also cover how to update beneficiaries and create an estate plan that reflects their wishes.

Suggested Handouts: Pre Retirement Checklist, Retirement Planning Brochure

Pre-Retirement Strategies Video Series

We have created a Pre-Retirement Digital Series you can share with your employees to help them better understand retirement—one step at a time. Each topic is delivered in short, easy-to-digest segments they can watch anytime at their own pace, and revisit as often as needed. The series covers all the key areas listed below to support confident retirement planning.

On-Demand: Pre-Retirement Lifestyle
On-Demand: Strategies to Boost Your Retirement Income
On-Demand: Pre-Retirement Investments
On-Demand: Pre-Retirement Healthcare
On-Demand: Pre-Retirement Estate Planning

Beneficiaries

This workshop will explain why it is essential to set up and regularly review your retirement plan beneficiaries. Your employees will learn how beneficiary designations affect who receives their retirement savings, and what could happen if no one is listed—such as delays, probate, or unintended distributions.

Suggested Handouts: Preserving Your Savings for Future Generations; How to enter/update your Beneficiaries
On-Demand Video: Beneficiary Designations

Social Security Strategies

This workshop will aid your employees in developing a thorough grasp of the workings of this crucial government program and its potential impact on their financial well-being across various life stages. We will cover how working while collecting benefits affects their income, spousal benefit strategies, and how Social Security is taxed. They will also learn how to decide the best age to start collecting to maximize their lifetime benefit and get step-by-step guidance on how to enroll.

Suggested Handout: Build Your Social Security Strategy On-Demand Video: Social security strategies

Navigating Medicare: Preparing for the Reality of Health Care in Retirement

Transitioning from employer-provided health insurance to Medicare can be overwhelming, but this workshop will help simplify the process. Your employees will learn the basics of Medicare Parts A, B, C, and D—what each cover, what they do not, and how to avoid costly enrollment penalties. We will also compare Original Medicare and Medicare Advantage plans and provide access to expert guidance to help you choose the coverage that best fits their needs.

Suggested Handout: Introduction to Medicare On-Demand Video: Medicare strategies

Prepackaged Ready-to-go Campaigns

Raise Participation Campaign

To boost participation in your retirement plan campaign, we will focus on clear communication and personalized engagement. Highlight the benefits of enrolling early, such as employer matching and long-term growth, using simple, relatable examples to show the impact of saving over time. Provide easy access to tools and resources—like retirement calculators and educational webinars—and consider targeted outreach based on employee demographics or life stages. We can reinforce the message through multiple channels, including email, intranet, and live sessions, to ensure employees understand the value and convenience of participating.

No amount is too Small to Start Saving: How to get low-income earners to save inside their retirement plan

Lower-earning workers have the same retirement savings needs as anyone, but they struggle with challenges that higher-earning workers may not. BOK Financial experts address some of these challenges and explain how through engagement plan sponsors can help low-earning workers overcome these obstacles. By doing so, plan sponsors can provide better equity for workers from diverse income groups and cultural backgrounds.

5 Ways in 5 Days Campaign

Give your employees five days to focus on their financial future! Our “5 Ways to Save in 5 Days” challenge is designed to help them take simple, impactful steps toward better money management. Each day, explore one key area:

1. **Set Up Automatic Savings** – Make saving effortless by automating deposits.
2. **Plan to Save** – Create a realistic budget and identify opportunities to save.
3. **Expect the Unexpected** – Build an emergency fund for life’s surprises.
4. **Save for Retirement** – Start or increase contributions to your retirement plan.
5. **Reduce Debt** – Take action to lower balances and free up future income.

Your employees can tackle these steps at their own pace and discover how small changes can lead to big results. Their financial security starts with five focused days!

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Secure Their Future: Beneficiary Campaign

Help Employees Protect What Matters Most: Offering a beneficiary update campaign is a simple yet powerful way to demonstrate your commitment to employee financial wellness. Many employees overlook this critical step, leaving their retirement savings vulnerable to delays and legal complications. By promoting the importance of naming a beneficiary, you help employees safeguard their loved ones and ensure their hard-earned savings are distributed according to their wishes. The process is quick and easy, and your support in communicating this message builds trust, strengthens engagement, and reinforces the value of your retirement plan. A few minutes today can make a lifetime of difference—help your employees take that step.

Centers of Influence Campaign

Identifying a "center of influence" within your workforce is one of the most effective ways to boost awareness and participation in your retirement plan. These individuals—trusted, well-connected employees who naturally influence their peers—can help communicate the value of saving for retirement in a relatable and authentic way. When employees hear about the benefits of the plan from someone they know and respect, it builds trust and encourages action. By partnering with these influencers, you create a ripple effect that spreads accurate information, dispels misconceptions, and motivates others to take steps toward financial security. Empowering your center of influence is a smart strategy to make your retirement plan message resonate across the organization.

America Saves Campaign: April 6-10, 2026

America Saves Week 2026 will take place from April 6–10, bringing together over 5,000 organizations to empower Americans to take control of their financial wellbeing. Under the theme "Own Your Financial Story: Small Steps, Big Impact," the week guides participants through five daily focus areas:

- **Monday, April 6** – Building a Strong Foundation
- **Tuesday, April 7** – Be Ready for the Unexpected
- **Wednesday, April 8** – Dream Big, Plan with Purpose
- **Thursday, April 9** – Rewrite the Debt Narrative
- **Friday, April 10** – Create Your Financial Future

This campaign encourages individuals to perform a financial check-in, set realistic savings goals, and lay out actionable steps toward achieving them. Participants will discover easy-to-use resources, strategies for emergency preparedness, practical debt-reduction plans, and tools to help them dream—and plan—beyond the basics.

401(k) Day: September 11, 2026

National 401(k) Day 2026 falls on Friday, September 4, offering a prime opportunity to boost participation and engagement in employer-sponsored retirement plans. Originating from the Plan Sponsor Council of America (PSCA), this annual observance emphasizes financial wellness as the work season gears up—bridging the gap between Labor Day and retirement prep.

This year's theme, **"Step Up to Retirement,"** encourages employees to take small, meaningful actions—like a 1% contribution increase—to accelerate savings and capture full employer matching contributions. Employers can enhance the spirit of the day with interactive events, from a "4.01K" walk/run to printable flyers, social media campaigns, and webinars that guide staff through topics like contribution boosts, automatic escalation, investment balancing, and goal visualization.

Celebrating National 401(k) Day 2026 helps transform retirement readiness into a shared experience—raising awareness, educating employees, and inspiring proactive decisions that pave the way toward a financially secure future.

National Retirement Security Week: October 19th – 23rd

National Retirement Security Week, observed during the **third full week of October**, is a dedicated initiative launched by Congress in 2006 to shine a spotlight on the importance of building a secure retirement foundation. This observance encourages individuals to take practical steps—such as reviewing retirement contributions, rebalancing investments, verifying beneficiaries, and exploring options like IRAs alongside employer-sponsored plans. Employers are encouraged to support the week with activities such as financial wellness seminars, on-site consultations, campaign challenges, and educational materials that promote informed decision-making and help close gaps in retirement preparedness. By engaging in National Retirement Security Week, you can empower your employees to proactively plan for a future of financial stability and reduce the stress associated with retirement planning.