



Rockwell Automation 2026 Participant Engagement Calendar

CHANNEL & OFFERING		Q1	Q2	Q3	Q4
 Workshops (Virtual) Topics selected to meet the needs of your employees at your largest locations		Feb Understanding Roth Contributions w/Roth Catch-up Module	Apr Strategies that Can Help You Manage Your Money	Jul How to Begin Investing for Retirement	Oct Five Key Factors for a Successful Retirement
		Mar Understanding Roth Contributions w/Roth Catch-up Module	May Set Goals and Save for What You Want	Aug Resetting Your Financial Foundation	Nov Maximizing Savings Opportunities
 Pre-Retiree 1:1s* (Onsite or Virtual) 3 days per month Seven sessions per day		Monthly - Virtual 1:1 Appointment Days: January - 6,15,16 February - 9,12,20 March - 10,12,18	Monthly - Virtual 1:1 Appointment Days: April - 9,10,20 May - 4,8,19 June - 4,5,16	Monthly - Virtual 1:1 Appointment Days: July - 9,20,21 August - 10,11,14 September - 10,16,17	Monthly - Virtual 1:1 Appointment Days: October - 8,12,15 November - 3,6,9 December - 1,10,11



All employees have access to Fidelity Planning Consultants for one-on-one consultations. 800-603-4015 8:30 a.m. – 9 p.m. ET, Monday - Friday