January 18, 2020
Bi-District Training Day

Personal Finance Workshop

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Sydenstricker UMC

Intro & Agenda

January 18, 2020
Bi-District Training Day

- Why are we here?
- Who is this guy?
- What is offered and to whom?
- Examples
- How does it work?
- Q&A

Why are we here?

- Testing a new concept
- Measuring interest and demand
- Looking for optimal way to launch
- Seeking feedback/input

Who is this guy?

- Retired military
- Accredited Financial Counselor
- Retirement Certified Professional
- Student at Wesley Theological Seminary

What is offered and to whom?

- Several different basic financial classes
- Possibly a Financial Wellness Workshop
- No individual counseling yet
- Any UMC in the Bi-District
  - Not restricted to members, can be an outreach
  - Limited by mutual scheduling availability

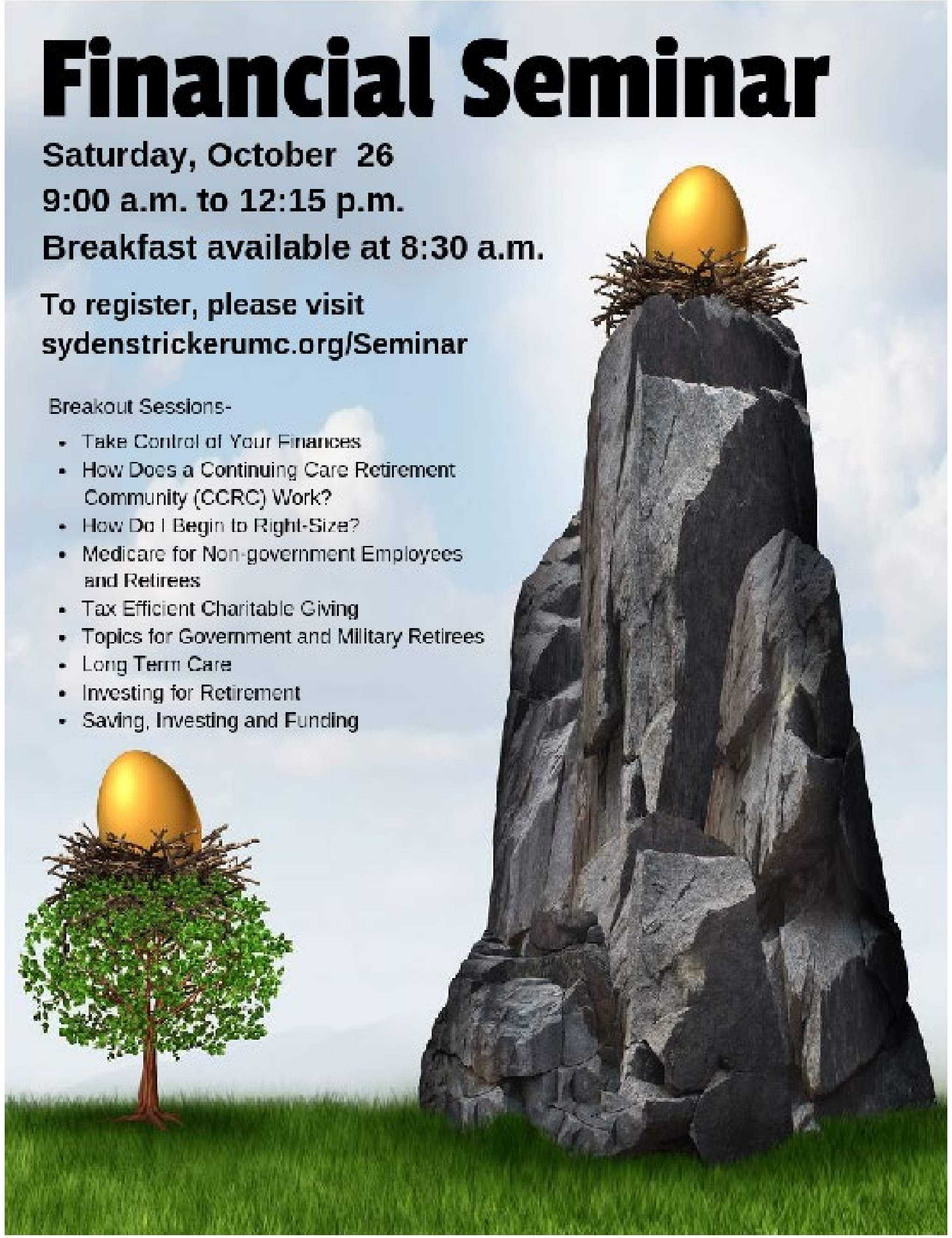
Examples

- **Credit Management:** establish/maintain good credit and determine a safe debt load; learn to effectively use credit; dangers/advantages of credit cards
- **Plan for Retirement:** basics of how to plan for retirement; learn to estimate retirement funding needs; compare and evaluate different types of retirement accounts: IRA, Roth, 401k/TSP, etc.
- **Saving & Investing:** learn about effects of inflation, saving and investing tools, and how to choose options based on time horizon, risk tolerance and financial situation
- **Stretching Your Money:** basic home money management; budgeting, identifying cash flow leaks, and credit dangers; ways to save; simple tax moves to modify cash flow
- **Topics for Gov't & Mil Employees/Retirees:** changes to TSP; if still working are you in TSP Roth? Retired or soon to be? What about Medicare Part B, SBP?
- **Insurance:** understand typical types of insurance and personal insurance needs to make informed choices about insurance products to manage risk, safeguard wealth, protect assets

Examples

cont'd

1/17/2020 Financial Seminar.png



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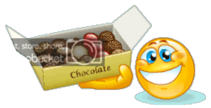
How does it work?

- We discuss what you think you need/want
  - Best to initiate contact by email
  - We can schedule time to chat
  - Determine mutually agreeable date/time
- You provide the place, and means to project slides (I bring a laptop)
- Late morning & early afternoon are options
- I always bring chocolate 

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