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Foundation for Personal Financial Education

BOOKING THE CLASSES

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Booking the workshops after the HR meeting

At the end of the HR meeting, ask when would be the best time for you to follow up.

At times, the HR/Training Manager will have to run the material by a few channels for approval. Follow up time is usually3 days to 1 week after your meeting.

When following up, your call may go like this:

"Hello, is this ________ (HR/Training Manager)? Hi, it is________ from the Foundation for Personal Financial Education...how are you? You had asked us to follow up with you this week to begin scheduling classes, and I have our calendar right here. I wanted to see when you wanted to do the first workshop?

When booking the workshops, look to book one class a month. This will allow word of mouth to travel as well as provide you with the time to meet with many of the attendees.

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The listing below gives a brief overview of the "Getting Fiscally Fit" series of workshops, and our "Advanced Series" of classes. Each of the workshops are 45 minutes in length, and include a 15-minute question and answer session.

The "Fiscally Fit" Series of Financial Planning Workshops

GETTING FISCALLY FIT

This class will provide a broad overview and introduction to sound financial management. We will review the roadblocks that keep us from reaching our goals, as well as discuss the various options for overcoming those roadblocks. Topics include:

- Basic Cash Management
- Accumulating Wealth
- Financial Hurdles
- Importance of Planning

ESTATE PLANNING

Learn strategies to reduce estate taxes, ways to keep your family out of Probate court, and how to insulate your kids' assets from their future creditors. Understand why titling real estate in "Joint Tenancy" may not be best if you are married and how to avoid Capital Gains Tax by titling your home properly. Will a court allow your family to sell your house if you have become incapacitated? Who will take care of my children when I am gone? Which is better a will or a living trust? When do I need a living trust? We'll answer these and other important questions in this informative workshop.

HOME OWNERSHIP & FINANCING

For most of us, our homes are the single largest investment we'll ever make. Because the tax code heavily favors homeowners, this class will help attendees understand the importance of home ownership, and provide a step-by-step map of how the purchase process works. And, because understanding home financing terms may as well be a foreign language, we'll also uncover common myths associated with buying a home. For example:

RETIREMENT PLANNING

Are you prepared? Whether you're 10 days, 10 months, or 10 years away from retiring, there are a number of key issues to address before you can make that move. You must be prepared for one of the biggest transitions of your life. This class involves a thorough review of retirement planning and the obstacles that can keep us from reaching our goals. We will review the various retirement plans available to us as well as a look at whether or not we are on track for the type of retirement that we are hoping for. Is your trip into retirement going to be a First Class or Coach trip?

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PROTECTING YOUR HOME & ASSETS

Explore different ways to protect your assets from your existing or future creditors. We will review how properly insuring and titling your house and car can protect your family. We will discuss use of umbrella policies and strategies to preserve assets for your heirs, and find out to what extent our spouses are liable for our debts. Learn how wealthy individuals use LLC's, corporations, and trusts to protect their assets from liability and taxes.

REAL ESTATE TODAY

Finding qualified buyers and selling your home can be extremely challenging in today's market. This class will help employees avoid losing thousands of dollars in price reductions, and provide a step-by-step process of how to add 10% or more to the price of a sale. We'll also take a look at the market today, and provide a map of where the market is likely to be headed.

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WORKSHOP PROMOTION

The key to any successful workshop lies in your ability to help the HR/TR Manager do the best that they can in promoting the event.

You will want to help the HR/TR Manager brainstorm on the different ways to promote the event.

Aside from providing them with a flyer, you should have the HR/TR Manager

E-Mail everyone 2 weeks before, 1 week before, 3 days before and the day of the event.

Put flyers everywhere
Lunch room
By the copier
In the restrooms

Stuff paychecks with flyers

Announcement over company PA system just prior to workshop.

You will want to do as much as you can to not only help the HR promote the workshop, but also do as much as you can to help the HR do their job more efficiently

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HEAD COUNT CALL

Hello, is this________? Hi _________, this is ____________ with the Foundation for Personal Financial Education. I'm just calling today to get a quick head count for the workshop scheduled for next week. We are preparing the handout materials, and want to make sure that we prepare enough of them.

NOTE: If you are delivering your workshop with the aid of a Powerpoint presentation, this is a good time to ask the HR to prepare whatever AV equipment that you will need to conduct the workshop.