

Educational Workshops

Below are brief descriptions of the presentation packages currently available.

A Financial Fire Drill

The Financial Fire Drill PowerPoint presentation, script and accompanying handouts are designed to help audiences work through how they might cope should their income drop due to a job loss or other adverse event.

Budgeting 101: A Balancing Act

Covers the basics of creating and maintaining a household or personal budget, including why to create one, how to create one and, most importantly, how to stick to one. Also addresses the issue of debt – how to manage it and ways to begin eliminating it.

Choosing the Right Insurance for Every Stage of Your Life

Addresses the importance of having the appropriate insurance and provides important information so individuals can evaluate and purchase insurance wisely.

Coping with Death: Financial Considerations in a Time of Need

Provides specific information on what to do immediately after the death or injury of a loved one and how to handle the long-term financial implications of death or injury.

Estate Planning: Introduction to the Essentials

Shows why individuals need an estate plan and highlights some of the basic components of an estate plan.

Financially Surviving a Job Loss

This latest presentation outlines financial planning options for soon to be displaced employees or unemployed workers. FPA's consumer brochure on job loss complements this presentation nicely.

Financial Planning and Your Small Business

Discusses the importance of financial planning related to owning and operating a small business.

Financial Planning Considerations for Long-Distance Caregiving

Provides specific information on financial considerations for long-distance caregiving, and offers some ideas that you can share with your senior clients and their loved ones who may live far away.

Financial Planning for a Home of Your Own

This presentation helps individuals get started on the path to homeownership by exploring some of the financial considerations involved in buying and owning a home.

Forging Your Financial Future

Provides a great overview of the financial planning process. Includes information about how a financial planner can help an individual or family. Also highlights some of the basic financial planning issues for individuals and families.

Introduction to Financial Planning Basics

Overview of financial planning process. Highlights steps from gathering information to implementation to monitoring. Designed to illustrate importance of financial planning.

“Investing Basics” 20 Tips for Becoming a Smart Investor

Discusses how investing fits into an overall financial plan and provides information about investing and investing concepts.

Planning for the Costs of Education

Provides advice on how one can save for their children’s education and includes several investment options to consider.

Real World Retirement Planning

Explores the universal reality of retirement, as well as the many savings and investment options individuals can rely on when planning for the future. Offers information relevant to each stage in a working adult’s professional life – from the twenty-somethings to the final years before retirement.

Taking Control: A Financial Planning Starter Kit

Provides eight steps to taking control of your finances. Audience will learn about budgeting, spending plans, setting goals, managing debt and more.

Tax Planning in a Changing Tax World

Did you know you already have an estate plan? The only question is whether it is the estate plan you want – the one that’s right for you and your family.

Teens and Money: Tips for Developing Good Financial Habits

Provides basic money definitions and an introduction to financial planning for kids ages 13 – 17. Covers basic financial concepts including goal setting, budgeting, saving and the time value of money.