



## WOMEN & WEALTH WORKSHOPS

Your Path to Clarity & Confidence in Money

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CERTIFIED FINANCIAL PLANNER™





## Women & Wealth Workshops

- 1. Class #1: Living with Money**
  - a. Ways to establish financial peace of mind to pursue passions
  - b. Tools for anxiety, stress, and worry about money
  - c. Communicating about money effectively
  - d. Wealth Work: understanding money in your life
  
- 2. Class #2: Personalizing Your Wealth**
  - a. Asking the right questions to make your money work for you
  - b. Aligning your money with your vision and goals
  - c. Prioritizing your goals in order of financial success
  - d. Wealth Work: completing your Money Compass
  
- 3. Class #3: Understanding Cash Flow & Budgets**
  - a. Building a balance sheet:
    - i. How to create one
    - ii. List assets and liabilities
  - b. Income and expenses
  - c. Credit scores
  - d. Wealth Work: aligning your Money Compass to your cash flow
  
- 4. Class #4: Creating Wealth Action Steps**
  - a. Debt analysis
  - b. Social Security and Medicare
  - c. Estate plan / Will / Trust / AHCD
  - d. Risk management
  - e. Tax planning strategies
  - f. Employee benefits – HSA, 401(k)
  - g. College funding
  - h. Retirement planning
  - i. Wealth work: identifying your wealth action steps
  
- 5. Class #5: Working Your Wealth**
  - a. Implementing your wealth steps
  - b. Automating your money and action steps
  - c. Using technology to support your goals
  - d. Wealth Work: making your money work for you