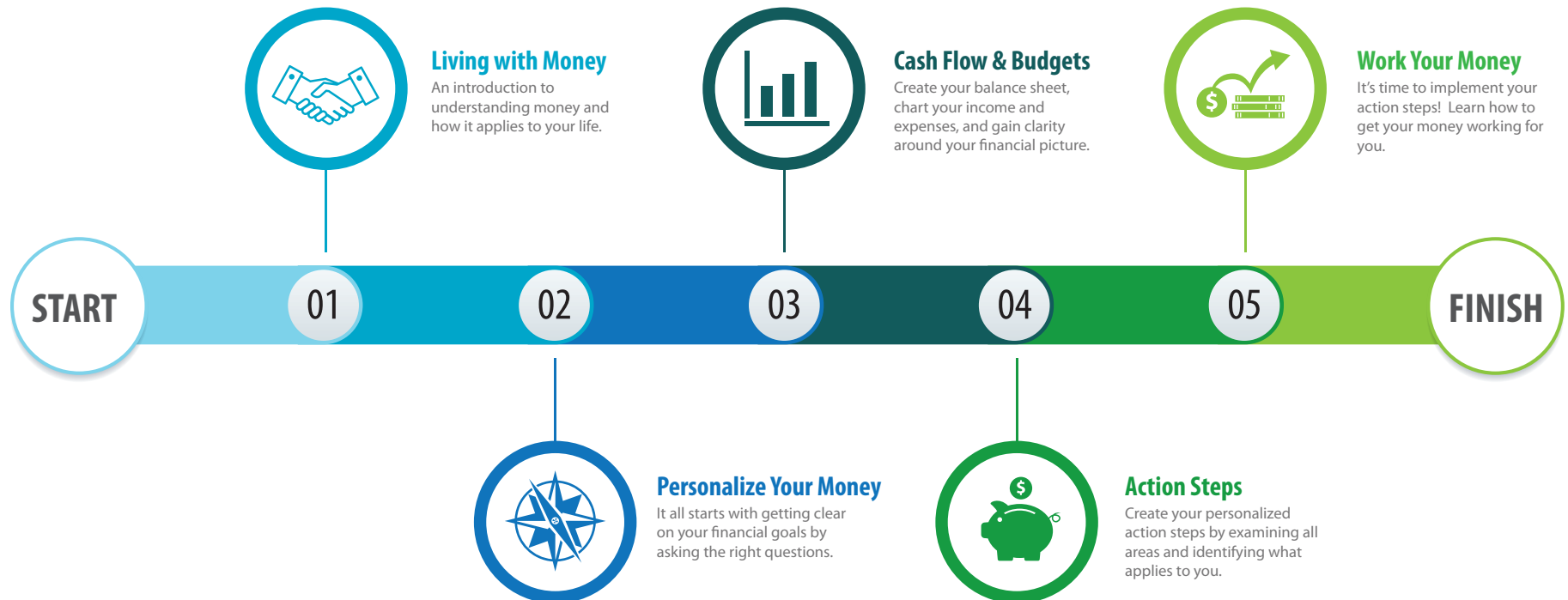




## FINANCIAL WORKSHOPS & ACTION STEPS FOR VETERANS

Presented by Stephanie Barnier  
CERTIFIED FINANCIAL PLANNER™





## Financial Workshops & Action Steps for Veterans

- 1. Class #1: Living with Money**
  - a. Ways to establish financial peace of mind and pursue dreams
  - b. Tools for reducing anxiety, stress, worry about money
  - c. Communicating about money effectively
  - d. Wealth Work: understanding money in your life.
  
- 2. Class #2: Personalizing Your Money**
  - a. Asking the right questions about money
  - 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: 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. Thrift Savings Plans
  - e. Wealth Work: aligning your Money Compass to your cash flow
  
- 4. Class #4: Create Your Personal Action Steps**
  - a. Debt analysis
  - b. Social Security, Medicare,
  - c. Service-Connected VA Disability
  - d. Estate plan / will / trust / AHCD
  - e. Risk management and insurance
  - f. VA Healthcare
  - g. GI Bill for veterans and spouses
  - h. College planning for kids
  - i. VA Loans
  - j. Retirement planning
  - k. Employee benefits
  - l. Wealth Work: identifying your action steps
  
- 5. Class #5: Implement & Work Your Money**
  - a. Implementing your wealth steps
  - b. Automating cash flows towards goals
  - c. USAA, Navy Federal, Military Programs
  - d. Wealth Work: making your money work for you