



Financial Planning for Life



Overview/Description:

Financial goals are the specific long- and short-term objectives to be attained through financial planning and management efforts. Among personal financial goals are things such as: 1) financial security 2) travel 3) education planning 4) retirement planning and 5) estate planning. Being able to succeed in reaching these goals requires a plan with appropriate milestones, along with the ability to make adjustments along the way.

Workshop Objectives:

At the end of this workshop, you will be able to:

- Understand the importance of having realistic financial goals clearly defined
- Recognize the importance of managing your finances to address these goals
- Develop achievable steps to stay on track
- Take appropriate action to monitor progress toward the goals and make adjustments



TARGET AUDIENCE:

ANYONE INTERESTED IN
TAKING RESPONSIBILITY
FOR CREATING A PLAN TO
MEET FINANCIAL GOALS



EXPECTED DURATION:

45-60 MINUTES

