FINANCIAL AWARENESS® INSTITUTE

EDUCATION IN PERSONAL MONEY MANAGEMENT

"BUILDING PROSPEROUS GENERATIONS…ONE PERSON AT A TIME"

(A) Basic Money Management Training:
Available through Seminars or Self-study

THE PROBLEM:

Many Americans live paycheck-to-paycheck. They have been affected by smaller salary increases, passed on insurance premiums, increased deductibles, terminated pension plans, not to mention the increase in the cost of housing, new cars, college and the daily cost of living. In a recent survey, 55 percent of employees said their productivity at work is affected by personal financial issues and concerns. Another 35 percent had to take time off work to deal with personal financial matters. These issues and concerns can lead to:

- increases in stress affecting family, work and lifestyle
- major marital problems including divorce
- loan/credit problems, repossessions and bankruptcies
- work problems including poor productivity, wage garnishments or being fired
- little or no retirement savings…a major problem for many

THE SOLUTION:

FAI's Making Ends Meet & Dreams Come True program is for people who are trying to enhance their money management skills so that they can avoid the problems described above. The MEM&DCT workbook is filled with assessments, worksheets and checklists that offer very practical insights, tips and tools around specific situations or problems regarding money. This program teaches the essentials of the personal financial management process with an innovative approach to budgeting, goal driven savings and retirement planning. The program focuses on the psychology of how and why people spend and manage their money as they do. Tips are offered on how to handle crisis situations as well as how family members can help each other learn and pass on the skills of good money management.

After completing this program, participants will be able to:

- Assess how they manage their money on a day-to-day basis.
- Complete a personal budget and balance sheet on a regular basis.
- Deal with crisis situations that might be affecting their personal money management.
- Identify ways to cut expenses so they can find extra money to save.
- Work out a payment plan with creditors if they are behind on bills.
- Determine their personal values, goals, and dreams.
- Know how to save the money needed to accomplish personal financial goals.

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DELIVERY OPTIONS:

- See (A) (1) for live seminars can be from two to six hours
- See (A) (2) for online self-study instruction

THE SEMINAR:

- The instructor is Gary Tagtmeier, CPA, Registered Investment Advisor, Real Estate Broker and founder of FAI
- Questions and answers are available throughout the seminar

MATERIALS INCLUDE:

- A 120 + page workbook that provides illustrations, exercises, design and humor that make this workbook fun to read and easy to use.
- A quick checklist of the specific process steps that are detailed in the workbook

OPTIONAL SERVICE:

- Post seminar telephone or one-on-one coaching is available (See (D) for information about Individual Coaching in Personal Money Management)

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