

Financial Wellness Workshop

Divine Savior Church, April 26, 2020

3:00-5:00pm, Room Y-1



Personal finances can significantly influence the wellbeing of a couple throughout their lives together. A marriage is made stronger when two people can learn to comfortably talk about money and work together as a team to define goals and manage a budget to achieve those goals. The workshop will introduce 10 habits, many of which attendees will realize they are already practicing. They may not be working as a team on all of them or there may be a few each person recognizes they could be doing better.

Planning Your Future: This focuses on the importance of writing goals together since this creates common ground and helps a couple prioritize. We then review the importance of budgeting and how couples can work as a team to manage spending and fund their goals. Lastly, we discuss how to make money a comfortable conversation topic so that surprises and shocks to the budget are discussed without emotions getting in the way.

Avoiding Common Challenges: This starts with a review of debt and why it can be so easy to accumulate and difficult to remove from your budget. We will discuss the importance of your credit score, what influences the calculation and how you review your credit reports. The last topic in this lesson will be a brief discussion around taxes.

Securing Your Future: This lesson begins with a focus on estate planning and protecting your income and assets. We will talk about taking advantage of workplace benefits and saving for retirement through employer-sponsored plans. Another important discussion focuses on having a plan to manage and grow your income. We will conclude with a discussion around using your finances to make a difference in the lives of others

RSVP to denise@divinesavior.com
WORKBOOK PROVIDED at no cost to couples who RSVP!!
No specific investment advice will be given, nor any products sold.

Presenter: **Mike Hackett**

SVP, Education

My Secure Advantage, Granite Bay, CA
A Financial Wellness Provider

Mike has been with MSA since 2011. He has built and delivered hundreds of financial wellness classes/webinars across the U.S for companies and organizations across industries.

Mike has an M.B.A from the Haas School of Business at Berkeley and spent 23 years in the investment management industry.

