FINANCIAL WELLNESS SEMINARS

Psychology of Spending
Each person has a money personality that influences attitudes about spending and saving. By recognizing the tendencies and attitudes that have shaped past decisions, participants will be able to make the necessary adjustments to change bad financial habits into productive ones.

Ten Steps to Financial Success
Financial success is not always dependent on income; in fact, many people earning an impressive salary struggle to make ends meet because they haven't followed the 10 basic steps discussed in this seminar. From developing a spending plan that works to setting goals to weighing insurance needs, this presentation covers the core concepts necessary to develop and maintain personal financial control.

Identity Theft
This presentation provides an overview of common identity theft practices, tools for preventing identity theft, and specific steps for victims of these kinds of crimes to take in order to minimize damage.

Financial First Aid
There are many circumstances in life that can destroy even the best money management plan. A job loss, unplanned medical expenses, or other personal crisis can financially devastate a family. This workshop is specifically for members in crisis – focusing on regaining control of the financial situation through careful financial assessment, expense prioritization, and effective negotiation with creditors.

Rebuilding After a Financial Crisis
Crises such as job loss or illness can throw a wrench in people's finances. The goal of this workshop is to help people who experienced a hardship get their finances back on track. Topics discussed include budgeting, repaying debt, rebuilding credit, establishing emergency savings, and replenishing retirement savings.

Stretching Your Food Dollar
This presentation will help you in stretching your food budget by helping you to understand why your plan isn't working now, gives you action steps for preplanning your spending and shows you the rewards of using coupons and rewards programs.

In addition to the seminars listed above, the credit union's financial advisors offer workshops covering topics like 401(k) strategies, college planning & 529 plans, living wills, trust services, estate planning & many more. All seminars/workshops are FREE for Truliant Business Partners.