<u>MoneyMinding Financial 360 Event Overview</u>

The MoneyMinding Financial 360 is a full-day, "big picture" overview of personal financial planning tools and techniques. These are the basics that that anyone who talks to people about money on a day-to-day basis needs to know to help their clients get the most out of their day-to-day money transactions, and their relationship with their money professional.

Participants will learn:

- What financial planning can do for them;
- What factors affect their financial plan;
- How to use tools to measure their financial well-being, including:
  - Calculating their net worth
  - Determining their income
  - Reading a balance sheet, and creating one for themselves
  - Knowing their lifestyle expenses
- How understanding the numbers helps them make better financial decisions;
- Why managing their credit can be the key to wealth;
- How to minimize their personal tax burden;
- The key features of different investment products, and how to choose the right ones for their situation;
- How businesses write financial plans, and how to sift through the numbers to find the "real story";
- How insurance can be a key tool in their financial well-being, even if they never need to make a claim; and
- Why estate planning now can save many headaches later.

Most importantly, you'll learn to identify the mission gaps in conventional money teaching. Financial 360 shows you what to do to reframe that old view to create more opportunities for wealth creation.

You'll hear some real-life stories about people like you, who are using simple MoneyMinding principles to understand their money and create life-long financial security for themselves and their loved ones.

Financial 360 helps you understand universal financial principles that work, no matter where you live, what you do or how much money you currently have.

Recommended minimum number of participants: 10 – no maximum

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