csp FINANCIAL GROUP

Legacy Builder group

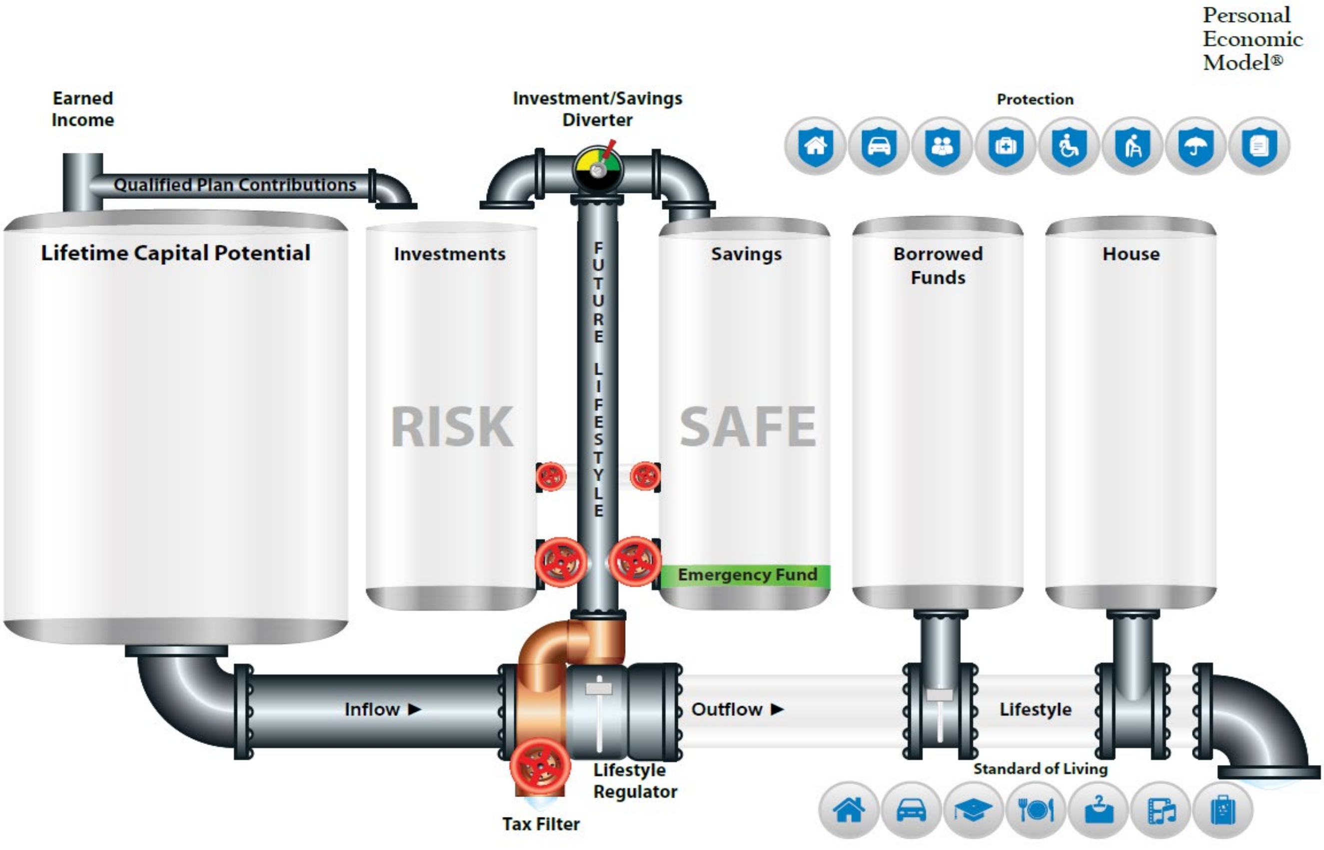
SYNERGY FINANCIAL GROUP

Lifetime Lessons on Successful Money Management

Financial Foundations Course

The People and Services You Need for Your Financial Foundations Planning

For many Individuals, Families and Business Owners understanding their finances can seem overwhelming.



Introducing the Financial Foundations Lessons on Successful Money Management for Individuals, Families & Business Owners.

Through the proper optimization & understanding of your current financial condition you can be more secure in your financial future.

The Financial Foundations Optimization workshop is presented by our most highly experienced Financial Advisor Coaches. The presenters are engaging, professional speakers with experience educating recipients in optimizing their financial swing. We have learned the importance of providing financial education to help people work toward a more secure financial future. Attendees will learn eight Financial Foundation Lessons on Successful Money Management. 16 Hours of training delivered in a group virtual setting.

“Discovery consists in seeing what everyone else has seen and thinking what no one else has thought.”

Albert Szent-Gyorgyi

Whether you are younger and just getting started, at Mid-Career or near retirement this workshop is for you! It makes little sense to accumulate a million dollars at retirement only to discover you lost a million along the way. Your financial future depends on how well you understand how money works and how to optimize your assets.

Your Personal Economic Model

- The Universe of Knowledge
- The Clubs VS The Swing
- Six major areas of wealth transfers
- The Debtor, Saver and Wealth Creator
- Controlling your Lifestyle Regulator

Understanding Tax Planning Strategies

- The Bucket Approach to Tax Planning
- Taxable Accounts
- Tax Deferred Accounts
- Tax Free Accounts

Social Security Optimization

- Benefit claiming strategies
- Spousal benefits
- Taxation of benefits in retirement
- Should I collect early or wait until later

Life & Health Insurance Benefits

- Importance of Proper Protection
- Living Benefits of Life Insurance
- Calculating future cost expectations
- Medicare & Medicaid
- Flexible Spending Accounts

Lifetime Financial Planning Process

- The Financial Planning Process
- Designing your Lifetime Financial Strategy
- The Savings Phase VS The Spending Phase
- Lifetime Planning from Cradle to Grave
- Financial Warning Signs
- Developing your Purpose Plan

The Truths about Investing

- Understanding your investment options
- To Roth or Not To Roth
- Choosing an Investment Philosophy
- Habits of Successful Investing
- 20 must answer questions about investing
- The Science & Academics of Investing

Understanding Your 401K and Beyond

- Optimizing your employer’s Qualified Plan
- Traditional 401K VS ROTH 401K
- How to choose the Investments in your plan
- Self Employed plans: SIMPLE, SEP, Solo K
- ROTH Conversions
- Distribution Strategies
- Building a Volatility Shield
- 72T Distributions
- In-Service Distributions

Estate Planning Basics

- Five must have documents
- Beneficiary designations
- Estate conservation
- Wills
- Trusts
- Power of Attorney
- Medical Directives

Course starting April 2022

Contact your coach to register now!

4:00 PM – 6:00 PM (PT) | 7:00 PM – 9:00 PM (ET)

Session #1 of 8: Thursday, April 7th
Session #2 of 8: Thursday, April 14th
Session #3 of 8: Thursday, April 28th
Session #4 of 8: Thursday, May 5th
Session #5 of 8: Thursday, May 12th
Session #6 of 8: Thursday, May 26th
Session #7 of 8: Thursday, June 2nd
Session #8 of 8: Thursday, June 9th

Text or Call **480-600-9626** for additional details