

# GETTING FISCALLY FIT WORKSHOP

PORTLAND, OREGON

GETTING FISCALLY FIT

HOME OWNERSHIP & FINANCING

ESTATE PLANNING

PASSPORT TO RETIREMENT

REAL ESTATE INVESTING

LONG TERM CARE PLANNING



**Foundation For  
Personal Financial Education**

A 501c3 Non Profit Educational Organization

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## A LETTER FROM OUR DIRECTOR HARLAN MAYER

Thank you for giving us your consideration. It is our sincere hope that we will be able to add value that will enable you to provide even greater benefits to your employees.

The Foundation for Personal Financial Education is a non-profit 501 (c)(3) organization comprised of a group of professionals from various financial industries that conduct educational classes for the enrichment of the participants.

For nearly 15 years, the speakers of FPFENonProfit.org have conducted classes for over 100 companies, government agencies and organizations. The speakers for FPFENonProfit.org have substantial knowledge, strong communication skills and a common goal of delivering the best educational classes possible.

As a team, we recognize that what we do makes a difference.

**FPFENonProfit.org can become a partner to employer groups. Our mission is to reduce the financial stress of your workforce through effective financial education.**

Our classes will help your employees develop sound financial strategies that, in the end will help them prepare for a successful financial future, as well as alleviate stress and help them be more productive on the job.

All the best!

HARLAN MAYER  
DIRECTOR



# GETTING FISCALLY FIT WORKSHOP SERIES

**T**HE FISCALLY FIT WORKSHOP SERIES IS DESIGNED TO EDUCATE AND EMPOWER EMPLOYEES BY PROVIDING THEM THE TOOLS TO MAKE SMART FINANCIAL DECISIONS. THIS WORKSHOP IS THE VITAL TRAINING NECESSARY TO BUILDING FISCAL CONFIDENCE AND RESPONSIBILITY. THE SIX-PART CLASSES FOCUS ON:



## GETTING FISCALLY FIT:

Building a solid financial future through the process of proper financial planning, including overcoming financial roadblocks, cultivating daily habits, and creating a financial blueprint.



## PASSPORT TO RETIREMENT:

Plan a first-class retirement through proper investment planning, including assessment of investment portfolios, measuring risk and the creation of an action plan for success.



## HOME OWNERSHIP & FINANCING:

Walking you through the home buying and selling process, including a run-down on today's real estate market and where the high and low markets are headed.



## REAL ESTATE INVESTING:

Look at the various types of real estate investments, financing options, short sale and foreclosure opportunities as well as the future of the market in the Northwest.



## ESTATE PLANNING:

Designed to "free your mind from the what-ifs of life," this workshop involves planning and preparing for the management and eventual transfer of wealth.



## LONG TERM CARE PLANNING:

Planning and preparing for the potential that you or a loved one may need long term care is an essential step to achieving peace of mind and gaining financial freedom.

# NINE FINANCIAL FACTS

- 1** FPFE is a national non-profit organization dedicated to financial awareness.
- 2** Money is the No. 1 cause of stress for 73 % of Americans according to a survey by the American Psychological Association.
- 3** Financial education in the workplace is proven to increase morale and lower rates of absenteeism and turnover.
- 4** The Foundation for Personal Financial Education consists of experienced financial services professionals who donate their time speaking and counseling.
- 5** 53 % of workers have not calculated how much they will need for retirement, according to the Social Security Administration.
- 6** FPFE workshops are not sales events, do not endorse products or mention any specific companies in our workshops.
- 7** A recent Gallup poll says that not having enough money to retire is the nation's biggest financial worry, concerning 2 of 3 Americans.
- 8** FPFE has been educating employees nationally since 1994
- 9** All FPFE members have completed a comprehensive professional Certification Course and passed a professional background investigation.

## MEET THE TEAM:



**HARLAN MAYER**

**REAL ESTATE  
BROKER**



**KIMBERLY  
WUEPPER RUDICK**

**FINANCIAL  
SERVICES  
PROFESSIONAL**



**JAMES ADAIR**

**MORTGAGE  
PROFESSIONAL  
NMLS 272766**



**PHIL HINGSON**

**ATTORNEY AT  
LAW**



## DON'T TAKE OUR WORD FOR IT: CLIENT TESTIMONIALS

“ IN MY YEARS OF WORKING IN HR, I HAVE NEVER COME ACROSS A MORE INSTRUCTIVE AND HELPFUL SERIES OF FINANCIAL WORKSHOPS. FPF E HAS PROVIDED OUR EMPLOYEES WITH A WEALTH OF INFORMATION ON WHAT CAN BE VERY CHALLENGING TOPICS— ALL DELIVERED WITH A SPIRIT OF PASSION AND HUMOR. ”

-CLAUDIA LASHLEY, PHR | CAREOREGON HR COORDINATOR

“ FPF E HAS PROVIDED SEVERAL OF THEIR PROGRAMS AT PSU OVER THE LAST 2 MONTHS. THESE PROGRAMS HAVE BEEN VERY WELL RECEIVED, THE FEEDBACK FROM ATTENDEES HAS ALL BEEN POSITIVE. THE CLASSES HAVE BEEN COMPLETELY FULL FOR THE MAJORITY OF TOPICS AND I HAVE HAD SEVERAL INQUIRIES FROM DIFFERENT STAFF MEMBERS ASKING WHEN WE WILL PROVIDE THESE CLASSES AGAIN. THE PRESENTERS ARE DYNAMIC SUBJECT MATTER EXPERTS, THAT ENGAGE THEIR AUDIENCE. THERE IS NO HARD SELL FOR FOLLOW UP INFORMATION. THESE ARE VERY MUCH VALUE ADDED PROGRAMS. ”

- KERRY GILBRETH | ASSOC. DIR. FOR HR, BENEFITS, LEAVES AND HR RECEPTION AT PORTLAND STATE UNIVERSITY

## IN GOOD COMPANY: PAST CLIENTS

PORTLAND STATE UNIVERSITY

CAREOREGON

UNITED STATES ARMY

BONNEVILLE POWER ADMINISTRATION

FRED MEYER

OP SIS ARCHITECTURE

HDR ENGINEERING

KAISER PERMANENTE

LEATHERMAN TOOL GROUP

MICROCHIP TECHNOLOGY

SYNOPSISYS

OREGON STATE BAR

CASCADE CORPORATION

TRIQUINT SEMICONDUCTOR INC.

MULTNOMAH COUNTY LIBRARIES

URS CORPORATION

VETERAN'S ADMINISTRATION

LEWIS AND CLARK COLLEGE