Financial Poise™

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FINANCIAL POISE WEBINARS
PERSONAL FINANCE & INVESTING FUNDAMENTALS 1.0

SERIES OVERVIEW

Earning a decent living is a necessary, but not sufficient, ingredient for financial independence and an affordable retirement. Spending smartly, saving enough, and investing responsibly are also essential. This webinar series assumes that, while you may be an expert in your chosen field and that you earn a decent income, you know little about investing. It will take you through basic investment principles, discuss goals based investing, and cover some of the legal and tax principles that every investor should have a basic understanding of. Each episode is delivered in Plain English understandable to business owners and executives without much background in these areas. Yet, each episode is proven to be valuable to seasoned professionals. As with all Financial Poise Webinars, each episode in the series brings you into engaging, sometimes humorous, conversations designed to entertain as it teaches. And, as with all Financial Poise Webinars, each episode in the series is designed to be viewed independently of the other episodes, so that participants will enhance their knowledge of this area whether they attend one, some, or all of the episodes.

EPISODE SUMMARIES

EPISODE #1
Basic Investment Principles 101: From Asset Allocations to Zero Coupon Bonds

Airing January 30, 2017 at 2pm CST

This webinar covers the *vocabulary* of basic investing topics. It provides a basic foundational understanding of different types of investments, different types of investment accounts and the tax attributes of each, different investment philosophies and styles and different types of investment advisors and advisory arrangements.

EPISODE #2

Goal Based Investing: Planning for Key Life Events

Airing April 3, 2017 at 2pm CST

This webinar addresses the differences between goals based investing and returns driven investing. It takes a deeper dive into the tools and processes used in goals based investing, as well as the rationale for focusing on goals based investing rather than return driven investing. In doing so it focuses on the role of *risk* in making investment decisions and plans.

EPISODE #3

The Legal & Tax Aspect of Investing: Estate Planning, Risk Mitigation and Tax Efficiency

Airing May 8, 2017 at 2pm CST

This webinar covers the tax treatment of different types of investment accounts, and the use of tax efficient investment vehicles to minimize taxes. It also addresses the use of estate planning strategies to minimize both income and estate taxes, as well as basic legitimate asset protection methods.