Financial Planning is about more than investing . . . it’s about managing your life . . . it’s for everyone!

Financial planning is the process of wisely managing your finances so that you can achieve your goals and dreams – while at the same time helping you negotiate the financial barriers that inevitably arise in every stage of life.

Not everyone needs a financial planner – but everyone needs a financial plan!

Everyone deals with money every day to survive. How you handle your money now and in the future is what financial planning is all about.

Through this “no-strings attached” program, presented in collaboration with the Foundation for Financial Planning, a nonprofit charitable organization, volunteer financial professionals can help you get a better picture of how you are using your money. They can then assist you in creating an individual plan to help meet your needs. A financial plan will help you budget for your expenses, set realistic financial goals, and determine steps to obtain your goals.

The no-strings attached program utilizes pro bono financial planners with the following objectives.

- Introduce the participant to the financial planning process.
- Provide one-on-one outreach to help with credit, debt and budgeting.
- Review of your own financial data.
- Help the participant set realistic financial goals.
- Establish steps to obtain your financial goals.
- No sales or promotion of any products or services will be provided.
- Advice given is educational only.

Foundation for Financial Planning
www.foundation-finplan.org