

# MONEY SMART WEEK®

## MARCH 30 - APRIL 6, 2019



### MONEY SMART WEEK Session Idea List

What to be a Money Smart Week partner but wondering what kind of session to present? Here is a list of potential session topics for you to consider. If a topic you are considering isn't on this list, share it with us!

#### Basic Banking Services

- Homebuyer Education Series
- Money: A Balancing Act *All aspects of checking accounts/avoiding overdrafts*
- Principles of Banking (presented in Spanish) *Beginners banking options*

#### Credit & Debt Management

- Getting the Credit You Deserve *Tricks to get the highest credit score possible*

#### Estate Planning

- Civil Unions & You *Info for Same Sex Couples*
- Creating a Legacy through Planning Giving *Charitable giving strategies*
- Estate Planning Update: Blueprint for Asset Distribution *Wills, trusts, POA, etc.*
- Honey, I Gave the Kids... *Dividing estate property, POA, healthcare directives*
- The Perils of Probate *Estate planning, wills, trusts*
- Legacy Planning 101 *Trust, will, asset protection; estate tax, Medicaid laws in Illinois*
- Avoid Inheritance Conflicts *Disbursed your estate as you intend, avoid swindlers*

#### Healthy Habits that Save

- Eating Healthy For Less *Eating healthy doesn't have to break your budget*

#### Housing/Mortgages/Foreclosures

- Preventing Foreclosure *Options lenders may offer; ways to be proactive with lender*
- Passport to Purchasing a Home *Ideas to build credit, income & asset documentation*
- You CAN Refinance Your Home *Home Affordable Refinance Program (HARP)*
- Answers About Home Buying Market *Info about options, i.e. short sales*

#### Identity Theft/Investment Scams/Financial Fraud

- Community Shred Day *Shred personal documents*
- Shred Fest – Paper & electronics *Shred and electronic collection*
- Keep you Info Safe Online *Keep personal info safe on internet*

#### Insurance

- Baby Boomer Guide to Turning 65 *Navigate Medicare, long-term care, insurance*
- Turning 65: Medicare /Social Security Facts *Eligibility, enrollment, benefits*
- What's Happening to Medicare? *Detailed Info about facets of Medicare*

#### Kids & Money

- How To Raise a Money Smart Child *Tools & techniques to talk to kids (age 4-12) about money*
- Money Smart ~Kids Read *Story hour about money, age appropriate activity, take home item*
- Teach Children to Save *Hints to teach kids to save – interactive money games*
- Fun & Safety Day *Fun ways for kids to learn to save; games, pony rides, petting zoo*

## **Money Management for Women**

- Woman's Guide to Money Matters *Take control of finances, retirement prep, pay for education*
- Divorce Changes Everything *Taking control of emotional/financial health*

## **Personal Finance 101/Budgeting**

- Get Checking *Secure an account, account management, credit building tips*
- Financial Management *Financial planning basics; develop goals; roadblocks to success*
- Managing Finances During Difficult Times *Strategies for reduction/loss of income*
- Fast Cash NO NO! *Other options to payday loans, cash advance stores*
- Financial Literacy & Rap Session *College student session (budgeting, credit cards, etc)*

## **Retirement Planning**

- Be SMART about Senior Living *Senior living options – 5 steps to guide you*
- Yellow Brick Road to Retirement *Follow road to financial peace, obstacles*
- Maximizing Social Security Benefits *Make most of SS, other retirement income options*
- Smart Choices in Retirement *How to achieve stable, steady income in retirement*
- Planning for Retirement *Panel: insurance, housing, financial planning, SS*
- Veterans Benefits/Resources *End of life care, funeral planning, benefits*
- Financial Red Zone 10 years before & Retirement *Financial goals*
- Addressing Retirement Concerns of Baby Boomers *Protect your nest egg/make it last*
- Retirement has changed – What's your next move? *Asset inventory; planning*

## **Saving & Planning for College**

- Unveiling the Mystery of Financial Aid *FA process*
- How will we pay for college? *Info about costs, scholarships, financial aid, financing*
- Funding your college education *Track sources of funding to pay for college*
- FAFSA Friday *Help students & parents complete application for Federal Aid*

## **Savvy Shopping & Bargain Hunting**

- Don't Pay too much for Funeral – Advanced Planning *Valuable info and ways to save money*
- Drive Away Happy *Prepare participants for car buying; young adults/first time buyers*
- Crazy Couponing *Maximize shopping using coupons*

## **Small Business & Entrepreneurship**

- R U ready to be an Entrepreneur? *What it takes to own your own business*

## **Taxes**

- Impact of Presidential Election on your Tax Bill *Tax code history, major tax rules, election impact*
- Health Savings Accounts *Eligibility, distributions, restrictions tax info*

## **Teens & Money**

- Teen Financial Reality Fair *Interactive game for students 13-18 learn about money (free pizza)*

## **Unemployment & Job Transitioning**

- Job Search Savvy without Going Broke *Avoid employment scams/maximize money in job search*
- Social Media for Job Hunting Trend in Branding Yourself *Tips to sell yourself & find opportunities*
- Best Practices: Online Job Seeking *Update resumes on Monster, use Monster Match & seek jobs*
- Choose Work! Work Incentive Programs *SSI/SSDI beneficiaries learn about work program*
- Seeking Work Online *Common job search engines, how to navigate, online tips, emailing resume*