

Principles of Financial & Retirement Planning

WORKSHOP OVERVIEW:

This course covers the basic financial planning tools you will need to take control of your finances. These tools include: understanding net worth, financial goals, debt-reduction, setting up a spending plan and saving for retirement.

The course will also discuss information about OPERS and SoonerSave. The information provided is great for anyone who needs to improve their finances regardless of how many years there are before retirement.

WHO SHOULD ATTEND:

Everyone!

OBJECTIVES:

The course will cover:

- Evaluating your current financial situation.
- Understanding how your everyday choices can shape your net worth.
- Defining and prioritizing your financial and lifestyle goals.
- Exploring methods for reducing debt and controlling spending.
- Applying wealth-building principles to help you reach your goals.
- Increasing your financial control through use of a spending plan.
- Overview of OPERS and SoonerSave basics

OUTLINE:

- A. Financial Fundamentals:
 - Assess where you are today?
 - Where do you want to go?
 - What will help you get there?
 - How do you implement your plan?
- B. Retirement Fundamentals:
 - OPERS – Plan basics for now and at retirement.
 - SoonerSave – How to get started and what resources are available to you.