ACHIEVING FINANCIAL SECURITY:
A COMMUNITY FORUM

From the Society of Financial Service Professionals
INCLUSION ADVISORY GROUP

www.AFSwithFSP.org
Why are we offering this program?

*There is an unmet need in the community.*

Financial illiteracy, the inability to understand key financial concepts and manage personal finances, is rampant in America. The cost is high: lost savings and investment opportunities, lives shattered by financial loss or bankruptcy, higher prices than necessary paid for goods and services, dreams and aspirations that go unfulfilled, marital and family discord about money. It’s not about lack of money; it’s about scarcity of knowledge.

Why does it matter?

*There is a real need for financial information, especially regarding retirement planning.*

The consequences of uninformed decision making can be devastating, so education is critical. Further, there is evidence that the impact of financial illiteracy is even greater when broken down by ethnicity and gender. Minorities and women have traditionally been underserved by the financial services industry. The Achieving Financial Security forum can help change that.

Why do we want you to host the program?

*The message is important, and the messenger matters.*

The content of the program addresses a real need in your community. It’s important that the message gets out, and as a trusted and respected part of this community your hosting it confirms the validity of the message (we need to end financial illiteracy) and facilitates the process (of education and guidance).

What does the program look like?

*A reflection of the real-life financial issues we all face, with expert guidance from within the community to deal with them.*

Local financial professionals, including financial planners, lawyers, accountants, will address the financial challenges that many in our community face. The format will foster interaction among the panelists, the moderator, and the audience as they address questions like:

- When is the right time to collect Social Security?
- What is the first thing a parent should do when a child turns 18?
- How can people protect themselves from bank fraud?
- How do you finance education, manage student debt?

Who is the Society of Financial Service Professionals?

*A nonprofit organization with thousands of members nationwide helping individuals, families, and businesses achieve their financial goals.*

The Society of FSP accepts as members only those who have or are pursuing professional credentials in disciplines such as law, accounting, insurance, financial planning. Founded more than 80 years ago, we remain committed to ethics, education, and building relationships that elevate our industry and our level of client service. Our members hold a strong commitment to serving both their clients and the communities of which they are a part.