



Join us for our upcoming **Financial Planning Basics** webinar on Thursday, September 5, 2024 from 12:00pm - 12:30pm!

Do You Have a Tailored Financial Plan in Place? A financial plan that is tailored to individual needs and circumstances could be beneficial and is something to consider. A financial roadmap can motivate you to save money, help you meet your financial goals, and help improve your overall financial security now and in the future.

In this seminar on Financial Planning Basics, you'll learn:

- How to construct a budget and the importance of establishing an emergency fund
- Credit fundamentals
- Basic investment concepts, including risk tolerance and the difference between pre-tax, after-tax, and tax-deferred investments
- Basic estate planning concepts
- FREE Financial Planning Tool available to all Plan participants - [Click for 1847 Wealth Advocate DEMO](#)

Hosted by 1847 Wealth Advocate

Thomas Landy, CRPS & William Capece, CFP®, SHRM-CP, CCWS

[Register Here!](#)

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1847 Financial

CRPS (Chartered Retirement Plan Specialist)

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