Master the Possibilities

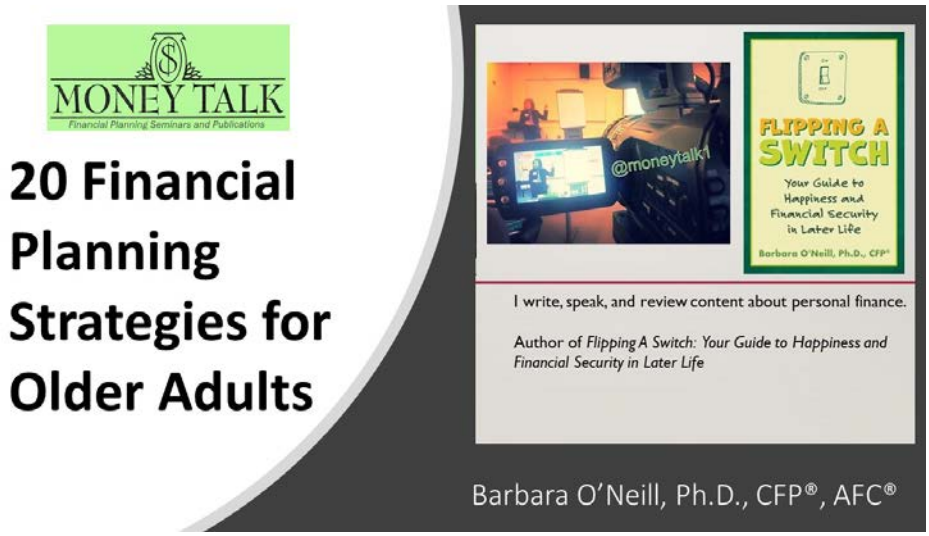
A Not-for-Profit Lifelong Learning Center

20 Financial Planning Strategies for Older Adults

Looking for unbiased information about personal finance topics to make financial decisions?

Don't want any sales pitches?

This class is for you!



Description of Class

At no time in life does personal finance get more confusing than the final third of a person's life. There are many new challenges and decisions (e.g., when to claim Social Security, required minimum distributions from retirement savings plans, and long-term care planning).

This class will discuss 20 financial planning tips for older adults on a wide variety of topics including investing , insurance, income taxes, estate planning, frauds and scams, and creating a retirement "paycheck."

This presentation will be taught by a financial educator who holds the certified financial planner® designation but does *not* sell consumer financial products or services. Ample time will be allowed for questions and answers.

Date/Time

Wednesday, May 10, from 1 pm to 2:30 pm

About the Instructor

Dr. Barbara O'Neill, CFP®, AFC® is the owner/CEO of Money Talk: Financial Planning Seminars and Publications where she writes, speaks, and reviews content about personal finance topics. She does not sell securities or advise individual clients. A Distinguished Professor Emeritus at Rutgers University, she was previously Rutgers Cooperative Extension's personal finance specialist for the state of New Jersey. Barbara tweets personal finance information @moneytalk1 and writes weekly posts for her Money Talk blog. She recently published a new book *Flipping a Switch: Your Guide to Happiness and Financial Security in Later Life,* about transitions experienced older adults.

Why You Should Attend

To gain new information a personal finance topics to inform important financial decisions. Knowledge is power!

Register online 24/7 at www.masterthepossibilities.org
or call (352) 861-9751 Mon-Fri, 9 a.m. to 4 p.m.

Master the Possibilities

A Not-for-Profit Lifelong Learning Center

35 Useful Personal Finance Web Sites

Looking for free online tools to learn about personal finance topics and make financial decisions?

This class is your roadmap!

Description of Class

Personal finance information is more useful and easily understood when it can be applied personally to our lives. Fortunately, there are many useful online tools (e.g., quizzes, calculators, and publications) from a variety of non-profit, educational, government, and for-profit sources to assist with financial decisions.

This class will describe 35 useful personal finance websites. It will also include information about topics that online resources are based upon (e.g., debt-to-income ratios, investment risk tolerance, and required minimum distributions). Participants are encouraged (but not required) to bring a device to try out websites during the class. Copies of the class presentation slides with links to online resources will be distributed.

Date/Time

Wednesday, February 10, from 1 pm to 2:30 pm

About the Instructor

Dr. Barbara O'Neill, CFP®, AFC® is the owner/CEO of Money Talk: Financial Planning Seminars and Publications where she writes, speaks, and reviews content about personal finance. A Distinguished Professor Emeritus at Rutgers University, she was a Cooperative Extension personal finance specialist for the state of New Jersey. Barbara tweets personal finance information @moneytalk1 and writes weekly posts for her Money Talk blog. She recently published a new book *Flipping a Switch: Your Guide to Happiness and Financial Security in Later Life.*

Why You Should Attend

To gain new information a personal finance topics and useful online resources. Knowledge is power!