1 on 1 Financial Coaching Sessions
Specifically for Retirees
Funded by an award from ACE/Sloan Foundation

Financial Coaching is an effort to help people assume more responsibility for their financial future while providing them with the tools to do so.

Wednesday, March 3, 2016
Murray Aikins Dining Hall - Upper Level
Limited Number of Appointments Available

Time Slots for Day:

- 10-10:45 am
- 10:45-11:30 am
- 1:00-1:45 pm
- 1:45-2:30 pm
- 2:30-3:15 pm
- 3:15-4:00 pm

You will meet with Certified Financial Planner, David K. Carboni, Ph.D., CFP®

In this 45 minute Confidential Financial Coaching session you will receive information, tools, and perhaps a dose of motivation, to empower you to make better financial decisions.

Financial Coaching helps you set short-term and long-term goals and confront your financial challenges.

Though Financial Coaching does not involve investment, tax or legal advice, it does:

- Help you sharpen questions about your personal financial challenges
- Help you apply financial planning techniques to improve your finances
- Help formulate practical strategies which will have the most benefits
- Help you set financial priorities
- Help you assume more responsibility for your financial future

Your Financial Coaching session could address any of the following topics:

- Setting up emergency funds
- Debt management
- Investment planning
- Insurance planning
- Developing viable spending plans (Budgeting)
- Basic estate planning
- Income planning

To register for the program, contact Terri Mariani in Human Resources at 580-5804, via email tmariani@skidmore.edu

- Appointments are on a first come basis -