The Personal Finance Boot Camp

Empowering Employees To Make Good Financial Choices

It's often a challenge for HR Departments to keep up with the constant changes in employee benefits, let alone the different healthcare and investment options now available. Employees need objective information to make wise choices, but most provider presentations are simply veiled sales pitches for *their* particular products.

The **Personal Finance Boot Camp** is different.

Typically held in 1 to 3 one hour sessions each, this fun and informative seminar covers a full range of financial topics of interest to your employees. Conducted by financial planner and author **Shannon McLay**, employees get the information they need to make smart financial decisions – whether they are just starting their career, are in the "near retirement" phase, and everywhere in between.

The **Personal Finance Boot Camp** covers a wide range of topics:

- Banking
- 401Ks, 403Bs, Pensions
- Insurance
- Healthcare
- Budgeting
- Debt Management
- Investments
- Retirement Planning
- Credit Scores
- Student Loan Debt

As Shannon is an **independent advisor**, the information provided is completely **unbiased**, and she does not promote a specific company or service. She is incredibly knowledgeable, but explains details in a way that employees can easily understand, with a style that is personal and down-to-earth.

The **Personal Finance Boot Camp** is perfect for **lunch or after-work seminars** and **employee benefit fairs**. Shannon provides helpful handouts, answers your employees' questions, and is available to meet 1-on-1 with employees, in accordance with your company's policies.

This value-added employee benefit will **save your company the time and effort** of holding separate seminars for retirement, healthcare and banking. Your employees will save time, too, and appreciate getting a total and objective picture of their financial options without the sales pitch.

About Shannon McLay

Shannon has worked in finance for more than 13 years. She founded her firm, **Next-Gen Financial**, after a successful career as a financial advisor for Merrill Lynch, where she built a flourishing practice working with high net worth individuals and their families.

Shannon writes **The Financially Blonde Blog**, which provides tips to help people make wise financial choices, and authored the book *Financially Blonde's Guide to Financial Fitness.*

To learn more about the Personal Finance Boot Camp,
call (914) 364-1609 or email Shannon at shannon@ngfin.com

The Personal Finance Boot Camp

Teach Your Students To Make Good Financial Choices

While most universities prepare students to become doctors, lawyers, teachers or business leaders, very few actually prepare students to manage their personal finances.

Now you can!

The **Personal Finance Boot Camp** is a fun and informative 1-hour session that covers a full range of financial topics of interest to your students, including:

- **Budgeting:** How to create one to live by; Your budget is your roadmap for success.
- **Investing:** Savings beyond your bank account; Retirement options and planning.
- **Credit:** How to use credit wisely; Credit card options; The importance of credit scores.
- **Student Loans:** How to manage this debt, tips, tools and resources to utilize.
- **Insurance:** The benefits of life and health; How recent legal changes can impact you.

Conducted by financial planner and author **Shannon McLay**, students get the information they need to make smart financial choices now while they are in school and later, when they graduate. Shannon has counseled numerous “millennials” in her career and knows how to explain personal finance in a way that students can easily understand and relate to. And as an **independent advisor**, she provides completely **unbiased** information, and does not promote a particular company or service.

What’s more, the **Personal Finance Boot Camp** saves your university the time and effort of holding separate seminars for student loans, investments, and so on. Your students will save time, too, and appreciate getting a total picture of their financial options, tailored to the needs of their generation, not their parents’.

This seminar is available in a 1-hour condensed format or Shannon has curriculum for a two to three day “mini” class at the end of which, students will have created a full financial plan for their future. For either format, Shannon will provide helpful handouts, answer your students’ questions, and is available to meet 1-on-1 with students after the event.

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