

pete the planner workshops

Workshop Attendees Receive:

A copy of the book 60 Days to Change: A Daily How To Guide With Actionable Tips To Improve Your Financial Life

The Workshop teaches the attendees:

- How to keep their finances organized
- How to identify and address problem areas
- How to set financial goals

Credit/Debt

- Order a credit report
- How to identify damaging items on your credit report
- How to “fix” problem items.
- How to pay down debt
- Understanding a mortgage
- Avoiding debt consolidation and bankruptcy

Control Monthly Spending

- How to keep the proper amount in checking
- How to reduce food and grocery costs
- How to reduce utility bills
- How to address overdraft fees

Create a budget

- Managing a surplus or shortage
- Find surprise bills
- Establish Price Targets
- How to run a monthly budget meeting

**Financially stress-free employees
are better employees.**

-Pete The Planner

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Risk Management

- Identify financial emergencies
- Build your emergency fund
- Insurance
- Wills and Trusts

Savings Habits

- Risk
- Retirement
- Finding a financial advisor

Major Purchases

- How much car can you afford?
- How much house can you afford?
- How to deal with purchasing a house or car
- Buyers Remorse

Charity

- How to make charity a priority on any budget

These programs are intensive, and the attendees will accomplish quite a bit at the meeting itself. Each person will leave with a plan on how to improve their life drastically in the following 60 days.

**Money has nothing to do with
money. It's about habits.**

-Pete The Planner