



Dwight Davis
Certified Performance Technologist
Lighthouse Performance Consulting
Voice/Msg: 972-675-9165 • DDavis@lighthouseperformance.org

Development Training

Course Details

Code: **FP1** – Contact Dwight Davis for arrangements regarding this course.

Name: **IMPROVING YOUR FINANCIAL PLANNING SKILLS**

Type: Team and Personal Skills Development for employees, supervisors, and managers

Duration: 1 Half Day – 8:30 A.M. to 12:30 P.M. or 8:00 A.M. to 12:00 Noon (suggestions only)

Estimated Cost: Contact us for a quote tailored to your specific requirements.

Description: This course will provide your employees with an improved understanding and development of effective financial planning principles and skills used to lead teams and develop satisfied customers.

The topics to be discussed are as follows**:

- The basics of financial planning
- The power of compound interest
- Cash management and budget planning
- The personal financial statement
- Income tax considerations and planning
- Insurance and risk management
- Investments planning
- Knowing customer's investment personality
- Special or unusual events planning considerations – college, wedding, vacation, inheritance
- Coping with a financial crisis
- Retirement planning
- Crucial considerations of customer retirement profile
- Estate planning
- Building and establishing lifetime customer relationships

**** Please note that this package is currently being revised and there may be some changes in content.)**

Objectives: Upon successful completion of this training, your employees will have an improved understanding of successful financial planning principles and skills. In addition, participants will be able to use additional skills to more effectively lead and develop successful teams.

Course Delivery Method:

The format is classroom workshop facilitation training and instruction.

Course Materials:

There is one (1) presentation package for this course with handout packages for participants. "Improving Your Financial Planning Skills" – 40 plus pages.

Notes:

Feel free to bring paper and writing instrument to take notes.

This course will be "fun" as well as educational! You learn MORE when you are having fun!