



# Attaining Financial Wellness

## Fall into Fitness

September 15<sup>th</sup> – November 17<sup>th</sup> / 10 Tuesday Evenings - 6:00 pm to 7:30 pm  
Remote - Online (for your convenience & safety)

Learn the necessary steps to put yourself on the path towards a successful and secure financial future. This course will be a fun interactive 10-week program covering the basics and beyond along with must follow steps to secure your finances well into the future including Investment Basics, Life Events, Debt Management, Retirement Income Planning, optimizing Social Security and more. Don't miss out!



This course is taught by a Chartered Financial Analyst / Certified Financial Planner - Bonnie Yam, CFA, CFP, ChFC, EA, CLU, RICP, CVA, CEPA

### Course Details Include:

#### I. Financial Wellness Foundations (4 classes)

- A) Financial Budgeting
- B) Investment Basics
- C) FICO Score and Debt Management
- D) Net Worth and Retirement Gap Income

#### II. Life Events (3 classes)

- A) Buying or Renting a House
- B) Buying or Leasing a Car
- C) College Financing

#### III. Income Planning (3 classes)

- A) Retirement Income Planning
- B) Social Security
- C) Medicare



**Sign Up Today !**

To register by phone, call 914-606-6830, press 1 (class # 90354)  
Cost of the class is \$195.00

To sign up in person, go to Room 207 in the Administration Building