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RFA
Reilly Financial Advisors

WEALTH MANAGEMENT

General Education Workshop

Reilly Financial Advisors General Education Workshop

President Frank Reilly and Vice President Mark Shane will be on-site to provide two days of General Financial Education. Each session lasts approximately 2 hours. The workshop uses the analogy of a road-trip to help audience members better understand and engage in the workshop.

Reilly Financial Advisors will provide pizza, appetizers, an assortment of beverages including coffee and tea, as well as a Comprehensive Financial Plan offer to all those in attendance.

Day 1

Objective:

Help members understand a broad range of financial tools and concepts that can apply to everyone, regardless of income or net worth. Information learned throughout the two-day workshop will help attendees make informed financial decisions in the future. The workshops cover investments, taxes, savings & retirement plans, and estate planning.

The workshops provide general financial advice. During both days, Frank and Mark will extend the offer of a personal financial analysis, homework to help design each member's individual financial future, and a complimentary financial analysis (provided by the RFA Financial Planning team in the weeks/months after the workshop).

Destination:

Before one can begin preparing for retirement, they need to decide where exactly they want to end up, their destination. This portion of the workshop helps members decide on their personal goals. They must also figure out who they will be planning for.

Starting Point:

The Starting Point helps members put pen to paper, and assess where they are financially today in order to help them plan and prepare for where they want to be in retirement. This portion of the workshop also includes handouts that allow attendees to build out their own Personal Financial Statements.

Vehicles:

In order to reach your destination, you must utilize a vehicle. The Vehicles portion of the workshop reviews Why, What, How, and Where to invest. Deeper knowledge about taxes, investment options (stocks, bonds, real estate, cash, commodities, mutual funds, ETFs, and annuities), and account types are discussed. The details of the retirement plan are also discussed.

Day 2

Path:

Now that members have a more solid understanding of where they want to go and what they can utilize in order to reach those goals, they set out a path. Investment risks and asset allocation are heavily discussed during this portion of the workshop.

Reroute:

We all know that on the road of life, many obstacles come our way. During the Rerouting portion of the workshop, possible roadblocks that can occur on our journey are discussed, as well as potential ways to avoid and prepare for those roadblocks. Discussion of Health Care, Medicare, Social Security, Disability Insurance, and Life Insurance and where they may apply are discussed. It's important to note that RFA is not an Insurance Agent.

Side Trips:

On the road of life, one can decide to take multiple side trips. In regards to finances, common Side Trips include Estate Planning, College Planning, and future care planning. Homework is given during this portion of the workshop to ensure that one's wishes are properly executed.

Navigator:

This portion of the workshop provides options that members may choose when making financial decisions, and discusses industry accreditations and their importance.

A plan for implementation is also discussed in Navigator.