OMG media solutions

Cultural Financial Literacy
(Licensed/Proprietary)

Instructors:

Kimberly Helm, MA, MBA, AFC
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Mobile Phone: 651-592-3370
Instructor Office Hours: 6:00 PM - 8:00 PM Wednesday or by appointment
Professional Background:

- Content Marketing Account Manager, Thrivent Financial (Current)
- Financial Advisor, Ameriprise Financial (Franchise owner) with organization 12 years

Education:

- Concordia University, MBA 2012
- Concordia University, MA Organizational Management, 2009
- University of Wisconsin at Madison, BS Consumer Sciences with a Concentration in Personal Finance, 1995

Certification:
Accredited Financial Counselor, 2015

Monique Linder, M.B.A.
Email: monique@omgmediasolutions.com
Mobile Phone: 612.787.8705
Education:

- Masters, Business Administration, University of Minnesota Carlson School of Management
- Bachelor of Science, Information Technology, University of Phoenix

Instructor Background:

- Founder/CEO, OMG Digital Media Solutions, LLC (10 years)
- 25+ Years Media Director for Entravision / CBS Radio / iHeartMedia
- 10+ Years Content Producer (Podcasts, TV, Radio and Entertainment)
- Elected / Served MN Alliance for Women In Media President (2 years)
- Elected to St. Jude/ALSAC Advisory Board (3 years)
- Elected to Better Business Bureau Board (3 years)
- Elected to Visit St. Paul Board (1 year)

Meeting Location: OMG Studios

Course Title: Cultural Financial Literacy

Course Description:
This course is a train-the-trainer for individuals who teach financial literary and focuses financial literacy with a cultural lens.
From this course, you gain financial literacy by learning skills and recognizing traps that can derail you from effectively managing your money. More specifically, you will learn the following:

-To gain an understanding of responsible personal financial management
-Obtain skills to apply when managing your finances
-Why financial management understanding is important
-Building personal empowerment and confidence for financial responsibility and freedom

While some of the content the men might already be familiar with, they will learn useful ways to build, or rebuild, their pocketbook to gain financial security.

Total Hours: 8 hours (Full Day or 2 half-days)

Curriculum Audience Core Abilities:

1. Communicate effectively using reading, writing, speaking, and listening skills.
2. Interact with others in groups or teams in ways that contribute to effective working relationships.
3. Use critical and creative thinking to solve problems, resolve conflicts, make decisions, and complete tasks.

Program Outcomes:

1. Demonstrate critical thinking skills
2. Communicate clearly
3. Examine the consequences of failing to adhere to presented financial principles
4. Apply ethical and professional behaviors
5. Demonstrate leadership skills to manage processes
6. Solve problems individually and in team environment
7. Complete the process of identifying, gathering, measuring, summarizing, and analyzing financial data

Course Competencies:

1. Ability to manage checking and savings accounts
2. Decipher the difference between a need and a want

3. Upon completion of this course, participant will have the ability to make decisions that will affect their personal financial situation appropriately

Class Schedule:

Week 1: Welcome

Introductions & Introduction to course
Review Syllabus
Cultural Financial History

Week 2: Personal Finance – Money Matters:

Topics:

Paycheck
Budgeting
Saving/Spending
Net Worth, Cash Flow
Goals

Week 3: Personal Finance – Bank On It:

Topics:

Checking/Savings
Types of Financial Institutions (Banks, Credit Unions)
Hiway Federal Credit Union

Week 4: Personal Finance – To Your Credit:

Topics:

Define credit, why is it important?
Credit reports
Develop, repair or maintain credit
Identity theft

Week 5: Personal Finance – Borrowing Basics:

Topics:

Types of loans
Secured vs unsecured
Rent to own services
Rent vs buy

Week 6: Personal Finance – Benefits:

Topics:

Where does your money go?
Paystubs, withholdings, social security

Week 7: Personal Finance – Keep it Safe:

Topics:

Knowing your legal rights to protect your money
Insurance

Week 8: Personal Finance – Legacy:

Topics:

Estate Planning
Tax triangle
Charitable giving

Week 9: Personal Finance – Pay Yourself First:

Topics:

Risk tolerance
Investments
Retirement

Week 10: Personal Finance – Your Plan Presentation:

Topics:

Class overview
Final Presentations – How are you going to apply what you've learned to your personal financial situation?