

# Financial Management

## I M A G E L I S T

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|------|---|------|---|
| 0010 | Welcome   | 0260 | Types of Funds<br><i>Bonus slide</i>  |
| 0020 | Workshop Objectives   | 0270 | Six Steps to Financial Success:<br><b>Manage Your Taxes</b>                         |
| 0030 | Our Commitment  | 0280 | Taxes Are Not Equal   |
| 0040 | Evaluation Form   | 0290 | Take a Close Look at Your Tax Return  |
| 0050 | About Your Workbook   | 0300 | Form 1040   |
| 0080 | Six Steps to Financial Success  | 0310 | Schedule B  |
| 0090 | Six Steps to Financial Success:<br><b>Protect What You Have</b>                           | 0320 | Why Pay Taxes on Income You Aren't Using?   |
| 0100 | Key Areas of Insurance Coverage   | 0321 | Investment Taxes to Consider  |
| 0121 | Health Insurance Marketplace  | 0330 | Tax-Favored Investments<br><i>Bonus slide</i>                                       |
| 0130 | Life Insurance: Three Critical Questions<br><i>Bonus calculator and workbook exercise</i> | 0331 | Potential Tax Savings on Contributions to a Traditional IRA                         |
| 0131 | Group Coverage May Not Be Sufficient  | 0340 | Taxable Equivalent Yield<br><i>Bonus calculator</i>                                 |
| 0140 | Six Steps to Financial Success:<br><b>Take Control of Your Cash Flow</b>                  | 0350 | Six Steps to Financial Success:<br><b>Save for Retirement</b>                       |
| 0150 | Would You Invest in This Company?   | 0360 | Will the Smiths Have Enough to Retire?  |
| 0160 | You, Inc.   | 0370 | The Smiths' Sources of Income   |
| 0170 | Cash Management Process   | 0380 | The Smiths' Social Security Benefits<br><i>Bonus slide</i>                          |
| 0180 | Traditional Savings Vehicles<br><i>Bonus slide</i>  | 0390 | The Smiths' 401(k) Plans<br><i>Bonus slide</i>                                      |
| 0190 | The \$160,000 Credit Card<br><i>Bonus calculator</i>                                      | 0400 | The Smiths' Personal Savings and Investments  |
| 0200 | Six Steps to Financial Success:<br><b>Invest Wisely</b>                                   | 0410 | The Smiths' Income Shortfall  |
| 0210 | Mr. and Mrs. Taylor   | 0420 | Calculating the Cost of Retirement<br><i>Bonus calculator and workbook exercise</i> |
| 0220 | Mr. and Mrs. Taylor   | 0430 | Six Steps to Financial Success:<br><b>Leave a Legacy</b>                            |
| 0230 | Lessons Learned<br><i>Bonus calculator</i>  | 0440 | What Could Stand in Your Way?   |
| 0240 | Mutual Funds and ETFs   |      |   |
| 0250 | Why Do People Invest in Mutual Funds and ETFs?  |      |   |

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- 0450** Probate
- 0460** Federal Estate Taxes
- 0470** Long-Term Care
- 0480** The Cost of Long-Term Care  
**Bonus calculator**
- 0490** Estate Distribution Techniques
- 0491** Additional Estate Documents
- 0500** Testamentary vs. Living Trusts
- 0510** Six Steps to Financial Success
- 0520** Where Do You Go from Here?
- 0530** Where Do You Go from Here?
- 0540** Evaluation Form
- 0550** What to Bring
- 0560** Thank You

### Bonus features

*For Slide 0130:*

**0570** Calculating Life Insurance Coverage Needed  
*(calculator)*

**0580** How Much Life Insurance Do You Need?  
*(workbook exercise)*

*For Slide 0180:*

**0590** Are You Going Nowhere in Cash?

*For Slide 0190:*

**0600** How Much Does That Credit Card Really Cost?  
*(calculator)*

*For Slide 0230:*

**0610** Are Your Expectations Realistic? *(calculator)*

*For Slide 0260:*

**0630** Historical Performance of Mutual Funds

*For Slide 0330:*

**0640** Advantages of Tax-Deferred Growth

*For Slide 0340:*

**0650** Calculating the Taxable Equivalent Yield  
*(calculator)*

*For Slide 0380:*

**0670** Taxes on Social Security Benefits

*For Slide 0390:*

**0680** Employer-Sponsored Retirement Plans

*For Slide 0420:*

**0690** Calculating How Much You Will Need  
*(calculator)*

**0700** How Much Will You Need to Retire?  
*(workbook exercise)*

*For Slide 0480:*

**0730** Calculating the Cost of Long-Term Care  
*(calculator)*