



Fall 2025 FREE Personal Financial Workshops

Wednesdays from 6:00pm - 8:00pm via Teams

| | | | |
|----------|---|---------|---------------------------|
| Sept. 3 | All Covered: Your Guide to Insurance | Oct. 8 | Good Credit How to Get It |
| Sept. 10 | Car Buying: Put Yourself in the Driver's Seat | Oct. 15 | Paying for College |
| Sept. 17 | Finances For a Lifetime | Oct. 22 | Financing Your First Home |
| Sept. 24 | Budgeting & Debt Reduction | Oct. 29 | Save Like a Millionaire |
| Oct. 1 | Meet a Realtor | Nov. 5 | Banking and Credit Basics |

REGISTRATION IS REQUIRED

<https://forms.gle/yLUZGg1GtfFJtmcA6>



Contact Taryn Alexander for more information

(610) 280-1033

TAlexander@openhearthinc.org



WORKSHOP DESCRIPTIONS



FINANCES FOR A LIFETIME

Daily Money Manager Will Cover:

- Financial well-being
- Steps to attain financial success
- Budgeting & tracking expenses
- The affordability index
- Compounding.
- What kind of spender you are

SAVE LIKE MILLIONAIRE

Certified Financial Planner Will:

- Share tips for building a financial plan
- Explain savings vs. investment accounts
- Teach the power of compounding
- Coach you on how to save & invest wisely

FINANCING YOUR FIRST HOME

Mortgage Officer Will Cover:

- Choosing the right, affordable mortgage for you
- Mortgage components & key considerations
- House hunting tips
- The mortgage application process.

BUDGETING & DEBT REDUCTION

Financial Coach Will Cover:

- Budgeting
- SMART goals
- Debt and credit management (including interest)
- Saving strategies

PAYING FOR COLLEGE

Financial Aid Officer Will Cover:

- The cost of education
- A financial coach will review funding options: loans and grants.
- The differences between government and private sources

BANKING & CREDIT BASICS

Bank Branch Leader Will Cover:

- Basic banking terms
- Review banking products & services
- Discuss credit & its financial impact
- Share tips for managing accounts & using online tools

GOOD CREDIT: HOW TO GET IT

Financial Coach Will Cover:

- Explain how the credit system works
- Share tips to build credit quickly
- Discuss ways to boost your credit score

MEET A REALTOR

Realtor Will Cover:

- Building your homebuying team
- Tips for finding the right home
- Steps to settlement day

ALL COVERED: YOUR GUIDE TO INSURANCE

Insurance Representative Will Cover:

- Various Types of Insurance Coverages
- Deductibles, Copays, & Benefits
- Learning to Plan and Protect Your Assets

REGISTRATION IS REQUIRED

<https://forms.gle/yLUZGg1GtfFJtmcA6>



CAR BUYING: PUT YOURSELF IN THE DRIVER'S SEAT

Auto Broker Will Cover

- How to research the right car for your needs & budget
- Car financing options
- Tthe full car-buying process

Contact Taryn Alexander for more information

(610) 280-1033

TAlexander@openheartinc.org