Educators Financial Group

Available Workshops and Webinars

Choose from 45- to 90-minute workshops and webinars that cover a wide range of financial topics:

Walk into Retirement with a Plan:

Do your members think they will have enough savings to live the kind of retirement lifestyle they want? Here we'll shed some light on what their finances could look like in retirement, in order to uncover potential income gaps, and then propose solutions to fill them in.

Financial Planning 101:

Had a wave of new early career members? Help them get a jump-start on money management! From financial implications of their pension, to how to save for a down payment on a home, these are the basics that every early career educator needs to know.

Mid Career—Managing your Money for Financial Comfort:

Getting a better handle on cash flow. Reducing debt. Saving for the future. This workshop is all about focusing on the key goals your members should be working towards by the time they reach the midpoint in their career. Because time is ticking—the time to act when it comes to securing their financial future is now.

The Keys to Financial Wellness:

Balancing high debt levels and low savings can be quite the juggling act, especially after pension contributions and your other deductions. So if your members could use a little peace of mind when it comes to their finances, this is definitely the workshop for them.

The Ever Changing World of Credit:

When it comes to this subject, ignorance definitely isn't bliss. So from the good and the bad, to the downright scary — we delve deep into everything education members need to know about credit.

Mortgages 101:

If you think rates are the single most important part of a mortgage… think again. In this workshop, we'll help your members to de-mystify 'mortgage-speak' so they will be better prepared to ask the right questions, and be armed with the right strategies to become mortgage-free, faster.

Estate Planning for Retired Educators:

Having a solid plan in place during illness, or after they're gone, is the best gift your members can leave behind for their family. In this workshop, they'll learn about which documents they'll need to protect their assets, and ensure health care and final wishes are carried out.

Investing—Empowering You to Make the Right Choices:

From purchasing or renovating a home to starting and raising a family—financial goals start becoming larger as your members get further into their education career. This workshop will show how the power of investing can put your members on the financial path to achieving these goals, whatever they might be.

Independent Women:

Women comprise the majority of the education community, so we created a workshop that's all about providing financial fundamentals for the female educator.

If you are interested in the workshop(s) and webinar(s), please contact:

Natalie Adamczyk, *Relationship Development Manager*
Email: nadamczyk@educatorsfinancialgroup.ca **Phone:** (647) 460-1591

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