

Workshops and Pricing

Your Money, Your Questions

- All of your money questions answered, literally! Using a guided but flexible framework, this session allows you to ask your burning money questions in a comfortable, relaxed environment.

Secrets to Increasing Your Net Worth

After this workshop you will:

- Know how to analyze your Net Worth for strengths and weaknesses
- Understand the most efficient ways to increase your wealth
- Be able to identify the most common money mistakes that drag down Net Worth
- Have an action plan that will increase your wealth

Budgeting: Make a Plan and Stick to It

After this workshop you will:

- Be able to define and prioritize your values and goals by which you want to spend your money
- Understand the step by step process to create a budget
- Know which budgeting method fits best into your lifestyle
- Establish personalized methods of staying on track

Credit, Debt and You

After this workshop you will:

- Know the pros and cons of credit
- Estimate how much debt is acceptable
- Know the costs of credit and how to decrease them
- Know how credit scores work and how to improve yours
- Be familiar with ways of paying down debt more quickly

Introduction to Investing

After this workshop you will:

- Know the 8 Steps to Investing
- Understand how to build an investment portfolio
- Be able to analyze your investments' performance
- Know the pros and cons of “doing it yourself” and using an Advisor

Popular Investing Strategies

After this workshop, you will:

- Have an understanding of common investment strategies and who uses them
- Know the pros and cons of various investment strategies
- Come away with a strategy that “sounds like you”
- Be aware of resources that can help you learn more about your chosen strategy

Retirement: Ready, Set, Goal

After this workshop you will:

- Know your retirement goals
- Be able to estimate your “magic” retirement amount
- Understand government and private income sources
- Know how to calculate your progress
- Understand basic strategies to minimize taxes during retirement

RRSPs and TFSAs: Which is Right for You?

After this workshop you will:

- Understand the features of a Tax Free Savings Account (TFSA)
- Have a better appreciation how a TFSA could help with retirement savings
- Understand how a TFSA can be used in conjunction with other savings vehicles
- Have a better understanding of the savings vehicle best suited to your goals

Raising Financially Responsible Kids

After this workshop you will:

- Understand how your own money attitude affects your children
- Have resources to teach your children critical consumer awareness skills
- Be able to teach your children about saving, spending, investing and sharing
- Know how to implement an allowance strategy
- Know if a Registered Education Savings Plan (RESP) is right for your family

Length and Pricing

- Employer Workshops: \$600 + GST / workshop
- Typical workshops run 45-90 minutes and can be modified to fit the employer's time requirements.
- Longer sessions (e.g. 2 hour, half day, full day) are also available.

Individual Financial Counselling

- CentsAbility also provides confidential individual financial counselling at a rate of \$130 + GST / meeting

Contact morgan@centsability.ca or call 403.831.8576 for more information or to book a session.