Faithful Finance:

A Seminar on Living and Giving

Name: ______________________________

Email address: _______________________ phone: __________________

Address: ____

I plan to attend the seminar on:

☐ Wed. Jan. 16, 6-8 PM ☐ Sun. Feb. 10, 12-2 PM

Should we plan for you to have lunch/Dinner with us?

☐ Yes, please! ☐ No, thank you!

Do you need childcare (circle one) yes no

If so, for how many children (names and ages): ______________________

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The schedule:

The seminar begins with a large group workshop where you can learn more about the Biblical perspective on giving, the faith commitments behind Mt. Zion's budget process, and general explanations of the investments of Mt. Zion, special funds, and the general giving demographics of Mt. Zion. This opening workshop will last approximately 45 minutes. From there, you will choose a breakout session that interests you. The breakout sessions (listed below and described on page 2) will cover topics of interest for your particular life situation, offered by professionals in the field.

Please indicate below which breakout session you plan to attend.

☐ Planned Giving 101: how can Mt. Zion Members provide for future

☐ Teaching generosity and financial principles to young children

☐ Planning for Retirement

☐ Deciding How Much to Give of your Time, Talent, & Finances

☐ Living and Giving as a Young Family

☐ Estate Planning 101

☐ Long Term Care Planning

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Breakout Session Descriptions

Planned Giving 101

Planned gifts are almost always funded from accumulated resources or assets rather than current income. This workshop will discuss the "basics" of the most common Planned Giving Instruments. The overview will include the most common types of gifts: Outright Gift; Life-Income Agreements; Charitable Remainder Trust (CRT), Insurance Policies, Real Property, Tangible Property and Retirement Plans, and the corresponding advantages to the Donor and advantages to Mt. Zion UCC.

Teaching Generosity & Financial Principles to Young Children

In this breakout session we will discuss strategies for instilling gratitude and generosity in children at a young age. We will discuss practical examples of how to teach your children the importance of giving and saving, in addition to spending wisely. Finally, we will think together about how engaging these principles early can lead to long term habits for your child while also helping us, as adults, to be conscious of the example that we set for our children.

Planning for Retirement

Planning for life after work can feel overwhelming, but is a critical part of long term financial health. This workshop will explore the basics of retirement planning and insights into the changing nature of retirement, planning for unexpected medical expenses, and the ins and outs of social security and part time employment.

How Much Do I Give (of my Time, Talents, & Finances)?

There are many ways to give— giving of your time, your talents & energy and your finances and it can be challenging to know just how much of all those things you can or should give. This workshop will explore how to decide what you give and to whom, with a specific focus on giving (time, talent, & finances) to your church community. Practical and helpful tools and discussion, while also giving you the privacy and confidence to make your own choices that are right for you and your family.

Living & Giving: Finances for Young Families

This session will be broken down into two broad themes. First, we will discuss the tools available to help you achieve your saving and giving goals. Then, we will give you the strategies you need to help you balance all of the financial demands imposed on a young family with your own personal goals and priorities. Think of this as the money management/investing 101 you wish they would have taught you in school!

Estate Planning 101

Is it time for a check-up? Recent changes in both federal and state laws may create need to review your Will, Power of Attorney and /or Medical Directive (living will). Process of Probate explained in everyday terms we all understand.

Long Term Care Planning

When planning for your life as a retired person, long term care is an important consideration. During this workshop, we will discuss long term care insurance and questions to consider when thinking of long term care.