

FINANCIAL EDUCATOR SCHOOL

Curriculum

Adult Learning Focus

Financial Literacy Education
Workplace and Community Financial Education
Communicating Financial Education to Adults
Communication and the Instructor/Leader
The Adult Learning Process
Twelve Principles of Adult Learning
Motivation and Adult Learners
Promoting Financial Literacy Education

Financial Planning Focus

Goal Planning
Cash Flow Planning
Risk Management Planning
Debt Management
Investment Planning
Retirement Planning
Income Tax Planning
Estate Planning

There has never been a more imperative time in the history of America than today to promote and direct the critically important subject of financial literacy. Countless surveys expound upon the ill-preparedness of most Americans for retirement, college funding, risk management and other areas of financial wellness. To complicate matters even more, access to credit and purchasing opportunities have become more muddled than ever. Add increasing medical costs and shrinking medical plan coverage, along with the most serious long-term health care crisis in history and you have a potential disaster in the making.

This combination for increased financial education for employees and a desire by employers to improve

employee knowledge, productivity and financial well-being provides an incredible opportunity and responsibility for a certified designation which recognizes experts in this important field.

This course serves as an introduction and training for the first registered designation to recognize the financial professional who teaches others. It is called the CFE Certified Financial Educator® (CFEd®). Course instructors will guide applicants through the process of combining existing financial planning knowledge with key elements relative to working with and guiding adult learners in the ever important area of financial wellness.

Who Should Attend

- Employee Benefit Officers
- Employee Benefit Administrative Assistants
- Employee Benefit Auditors
- Compensation and Benefit Managers
- Plan Sponsors
- New Business Development Officers
- Private Bankers
- Retail Brokers
- Financial Planners
- Third Party Administrators
- Debt Management Specialists
- Estate Planners
- Registered Investment Advisors
- Registered Representatives

Class Schedule

Registration and orientation take place on Sunday afternoon and class begins Monday at 8:00 AM. The two and a half day session closes on Wednesday at Noon. Attendance at each session is mandatory.

Key Benefits

- Understand why a “financial literacy” movement is sweeping the country and how to be a part of this movement
- Learn how an employer’s bottom-line is tied directly to their employees’ financial well-being
- Learn why employers and employees are in dire need of financial education
- Discover how companies can profit from financial education
- Discover why professionals in the financial services industry are the best resource for employers when it comes to teaching and working with their employees
- Learn the most effective techniques for working with employees and teaching adult learners
- Learn the key reasons that employers are fearful concerning fiduciary liabilities and how to overcome them
- Understand the “value proposition” for workplace financial programs
- Learn how effective methods of delivery can motivate adult learners

COURSES



LOCATIONS



Myrtle Beach, SC

REGISTER

COURSES

Faculty

Fran M. DeMaris

Executive Vice President
Cannon Financial Institute
Champaign, IL

Duane E. Lee, II

Executive Vice President
Cannon Financial Institute
Athens, GA