Financial Wellness 101

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Ever wish you knew more about saving, investing, credit scores, budgeting, stocks, bonds, retirement plans, taxes and mortgages? Would you like to have a step-by-step road map to success with your money? Would you like to know the basic money management rules of thumb? Do you know how to make smart money decisions? What’s the most important thing you’re NOT learning at Chapel Hill? The overwhelming majority of students who graduate have the education, experience and drive to succeed in life, but lack the critical knowledge about how to manage their money. This webinar offers you the opportunity to learn real-life lessons from career investment and financial planning professionals.

After this webinar, participants will:

- Have a better understanding of what Financial Wellness means and how positive Financial Wellness makes your life better
- Learn step-by-step action items for improving your financial condition
- Learn important rules of thumb for financial success
- Have a better understanding of technology-driven budgeting, and examples of apps
- Know more about credit scores: what they are, why they are important and how I can improve mine
Presenter Bio: Richard Blankenship, CFA - Richard, a 35 year veteran of the investment management industry, is a principal at Franklin Street Partners of Chapel Hill. He provides financial advisory, portfolio management and financial planning services for high net worth and institutional clients of the firm. He has volunteered in giving Financial Literacy workshops to undergraduates and graduate students at UNC Chapel Hill since 2003. He is a CFA charter holder, and a member of the CFA Institute and the North Carolina Society of Financial Analysts.

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