

Fed Advantage

Financial Management

Introduction

- Workshop Objectives
- Our Commitment
- About Your Workbook

Portrait of a Millionaire

- What Makes Millionaires Different?

Six Steps to Financial Success

Protect What You Have

- Key Areas of Insurance Coverage
- Three Critical Life Insurance Questions
- Life Insurance Worksheet
- Group Coverage May Not Be Sufficient

Take Control of Your Cash Flow

- Cash Management Process
- The \$160,000 Credit Card

Invest Wisely

- Mr. and Mrs. Taylor
- Lessons Learned
- Mutual Funds
 - Why Do People Prefer Mutual Funds?
 - Mutual Fund Checklist

Manage Your Taxes

- Taxes Are Not Equal
- Take a Close Look at Your Tax Return
- Tax-Favored Investments
- Taxable Equivalent Yield
 - Calculating the Taxable Equivalent Yield

Save for Retirement

- Will the Smiths Have Enough to Retire?
- How Much Will You Need to Retire?

Leave a Legacy

- Probate
- Estate Taxes
- Long-Term Care
- Estate Distribution Techniques

Figuring Out Your Net Cash Flow

Figuring Out Your Net Worth

