

# Financial Literacy in the Workplace

## *Enhancing Financial and Economic Growth*

The Society for Financial Education and Professional Development (SFE&PD) develops and presents customized financial literacy and professional development training for individuals and organizations across the nation. We offer innovative financial education workshops and seminars for corporate and nonprofit organizations, government agencies, and educational institutions. The trainings are designed to meet the needs of target audiences and increase the financial knowledge of participants to help them make informed decisions for their long-term financial well-being. SFE&PD's seminars are recognized by the U.S. Department of the Treasury's Office of Financial Education for meeting their criteria for financial education programs.

### **Our seminars/workshops, developed for small and large groups, focus on:**

- Practical applications of personal money management concepts to increase the financial knowledge of employees in the workplace.
- Tailored learning for a range of individuals, backgrounds and demographics.
- Research-based national data to ensure each session is relevant to each group.
- Customized instruction for face-to-face presentations and webinars.
- Interactive design with a dynamic format to engage audiences and encourage thoughtful decision-making.
- Results that give attendees the tools, knowledge, and skills for financial and professional growth.
- Highly-skilled instructors – experienced Certified Financial Planners, Financial Advisors, CPAs, authors, and other professionals in finance, investments, estate planning, professional development, and related fields.

### **Financial Education Training**

Personal Money Management  
Credit and Debt Management  
Retirement Planning  
Estate Planning  
Investor Education  
Home Ownership  
Financial Coaching

### **Professional Development Training**

Team Dynamics  
Effective Presentation Skills  
Conducting Productive Meetings  
Corporate Culture  
Corporate Etiquette  
Workplace Professional Development  
Life Coaching

*SFE&PD is a leading financial literacy and professional development nonprofit organization on a mission to enhance financial and economic literacy in the United States and to provide training to help individuals to achieve their financial and professional goals. We conduct successful financial education initiatives nationwide and teach money management skills to individuals of all ages and backgrounds.*

