

Financial Education Seminars

Our brand promise is to educate and help our members become effective financial stewards.

If your organization is interested in helping its associates stay on track financially, Ascend Federal Credit Union can help. We offer free onsite or virtual financial education workshops for our partners.

Popular Topics:

Banking Basics

- How to work with financial institutions to help manage personal finances, grow wealth and safeguard money. Learn about the variety of account types available and receive a primer on how to open a simple account.

Budgeting

- Understand the value of creating a budget, and learn strategies to build a simple budget and pay off debt. Develop core habits to practice and maintain financial health.

Credit Scores & Reports

- Understand what a credit score is, its importance, and how to read a credit report. Learn the tools to maintain a healthy credit score and repair bad credit.

Financial Planning Basics

- Learn how to construct a budget, and understand credit fundamentals and basic investment concepts.

Identity Theft

- Consider methods used by identity thieves to steal personal information, and learn how to protect yourself. Understand what information is at risk and red flags to watch out for with regard to common scams.

Investment Basics

- Identify financial goals, understand how to allocate assets, and learn the difference between stocks, bonds and mutual funds.

Personal Finance for College Students

- Participants will learn how to obtain and use credit wisely, create a positive credit history and score, develop a budget and track spending.

Retirement Basics

- Create a retirement roadmap, consider factors which influence when to retire and how long retirement savings will last, and how to use tax advantaged savings like IRAs and 401(k) plans.

Additional Topics:

- Buying a Car
- College Planning
- Considering Homeownership
- Debt Management
- Estate Planning
- Introduction to Annuities
- Making Budgets Work
- Mobile Banking
- Mortgages
- Planning for Long-Term Care
- Retirement Income Planning
- Small Business Banking
- Social Security
- Your Employer-Sponsored Retirement Plan

To schedule a seminar, please email us at

bizdev@ascend.org



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