



United Way of Marshall County
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For further information contact
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www.marshallcountyuw.org



United Way of Marshall County
Money Smart Week® Schedule
October 16-23, 2010

The public is invited to attend any one, or more, of the following FREE presentations. Contact the United Way of Marshall County at (574) 936-3366 or visit our website at www.marshallcountyuw.org for more information.

Monday, October 18, 2010

9:00 a.m. - 10:00 a.m. "Strong Women Powerful Financial Strategies"

Presenter: Rodney Jacobs, Ameriprise Financial

Focuses on single women/ single income finances, Q&A sessions

Location: Ameriprise Financial 104 S. Michigan Street, Plymouth

10:00 a.m. - 11:00 a.m. "Retirement Has Changed. What's Your Next Move?"

Presenter: Craig Wilson, Edward Jones

Learn how to take inventory of current assets and determine how much money you may need during retirement.

Location: Plymouth Public Library, Laramore A Room

12:00 p.m. - 1:00 p.m. "How Credit Affects Insurance Premiums"

Presenter: Chris Morrow, Morrow Insurance

What you can do to improve your credit & insurance scores & reduce your insurance premiums.

Location: United Way Conference Room in Key Bank, Plymouth

6:00 p.m. - 7:00 p.m. "Plan For the Future. How an Estate Plan Helps Put You in Control"

Presenter: Bill Davis, Ameriprise Financial

Learn to care for the people you love, even after your gone, manage estate tax burden for you and your heirs. LIMITED SEATING

Location: Bremen Senior Center, 103 West Plymouth St, Bremen Call Lyn (573) 936-3366 to RSVP

6:00 p.m. - 7:00 p.m. "You Have just Learned That You Have Been Named Executor of Your Brother-in-Law's Estate, Now What?"

Presenter: Tom Lower, TCU Bank

Learn what to do when asked to be the Executor of an Estate. LIMITED SEATING

Location: TCU, 1501 N. Oak Road, Plymouth Call Beth 574-936-8926 to RSVP

6:30 p.m. - 7:30 p.m. "How to Create a Retirement Roadmap"

Presenter: Jay King, 1st Source Bank

Financially where am I today? How much money do I really need to retire? Is my plan on track?

Location: 1st Source Bank, 315 N. Michigan, Plymouth

6:30 p.m. - 7:30 p.m. "Roll It, Take It, Leave It, Move It: Know Your Employer Retirement Plan Options"

Presenter: Craig Wilson, Edward Jones

Determine what to do with assets in your employer sponsored retirement plan.

Location: Plymouth Public Library, Laramore A Room

Tuesday, October 19, 2010

9:00 a.m. - 10:00 a.m. "Medicare 101"

Presenter: Sue Thomas, TCU Insurance Agency

This presentation will educate you on the basics of Medicare. This is for all those who already have Medicare & for those who are "on their way" into Medicare. LIMITED SEATING

Location: Life Enrichment Center at the Marshall County Council on Aging, Plymouth Call Sue 574-936-5373 to RSVP

10:00 a.m. - 11:00 a.m. "Identity Theft"

Presenter: Officer Brooks Johnson, Indiana State Police What is identity theft, how your identity is used, how people obtain your identity and how to prevent it & what to do if you are a victim.

Location: Plymouth Public Library, Laramore A Room

1:00 p.m. - 2:00 p.m. "Charge it Right"

Presenter: Chris Campbell, Centier Bank

How to make a credit card work for you.

Location: United Way Conference Room in Key Bank, Plymouth

2:00 - 3:00 p.m. "Things You Need to Know When Starting A Business"

Presenter: Tom Franko, Franko, Johnson & Co. CPA's LLC

Things you need to think about when starting a small business.

Location: United Way Conference Room in Key Bank, Plymouth

2:30 p.m. - 3:30 p.m. "Four Things You Need to Know to Feel More Confident about Reaching Your Retirement"

Presenter: Rodney Jacobs, Ameriprise Financial

Focuses on retirement and retirement income, 30-minute Q&A afterwards.

Location: Ameriprise Financial 104 S. Michigan Street, Plymouth

6:00 p.m. - 7:00 p.m. "Making Your Food Dollars Work"

(FOR SPANISH SPEAKING INDIVIDUALS)

Presenter: Yolanda Gorke, Purdue Extension

The "Ins" and "Outs" of getting through the month, trip to the store, saving money and menu planning

Location: Purdue Extension (Marshall County Building, Room 304 LIMITED SEATING Call Yolanda 574-935-8545 to RSVP

6:30 p.m. - 7:30 p.m. "The Road to Recovery"

Presenter: Ken Stiles, Merrill Lynch

After asking "Are you prepared for an economic recovery?"

The presentation gives four positive steps that investors may take to benefit from it.

Location: Plymouth Public Library, Laramore A Room

6:30 p.m. - 7:30 p.m. "How to Create a Retirement Roadmap"

Presenter: Jay King, 1st Source Bank

Financially where am I today? How much money do I really need to retire? Is my plan on track?

Location: 1st Source Bank, 315 N. Michigan, Plymouth

Wednesday, October 20, 2010

9:00 a.m. - 10:00 a.m. "Tax Free Investing: It's Not What You Make, It's What You Keep"

Presenter: Craig Wilson, Edward Jones

Discusses the features, benefits, tax law implications, and 3 ways to purchase municipal bonds.

Location: Plymouth Public Library, Laramore A Room

11:00 a.m. - 12:00 p.m. "Debt Repayment Program"

Presenter: Jill Janda, Credit Counseling Office

Anyone who is struggling and finds themselves in a financial crisis. 30 minute Q&A after presentation.

Location: United Way Conference Room, in Key Bank, Plymouth

1:00 - 2:00 p.m. "I'm Your Uncle, Not Your Enemy"

Presenter: Linda Bellamy, IRS

Tax Tips for the Self-Employed. Find out what expenses are allowable, how to pay taxes on your profit

and identify the differences between employee and a self employed person.

Location: United Way Conference Room, in Key Bank, Plymouth

5:30 p.m. - 6:30 p.m. "Show Me the Money"

Presenter: Sarah Lawrence, Ancilla College

The ABC's of finding and completing scholarship applications. LIMITED SEATING

Location: Ancilla College, Donaldson, Room 119 Call Sarah 574-936-8898 x396

6:30 p.m. - 7:30 p.m. "Foundations of Investing"

Presenter: Craig Wilson, Edward Jones

Discuss key features of stocks, mutual funds, bonds and asset allocation, and the impact of inflation.

Location: Plymouth Public Library, Laramore A Room

Thursday, October 21, 2010

10:00 - 11:00 a.m. "Family Matters with Long Term Care"

Presenter: Craig Wilson, Edward Jones

How to help preserve assets and funding options for long term care.

Location: Plymouth Public Library, Laramore Room A

12:00 p.m. - 1:00 p.m. "Save Energy, Save Money"

Presenter: Marianne Peters, Wordsmith Writing Services

Easy ways to conserve energy that will allow cut-down on household expense. 30 minute Q&A afterward

Location: United Way Conference Room in Key Bank, Plymouth

1:00 p.m. - 2:00 p.m. "Strong Women Powerful Financial Strategies"

Presenter: Rodney Jacobs, Ameriprise Financial

Focuses on single women/single income finances, Q & A sessions

Location: Ameriprise Financial 104 S. Michigan Street, Plymouth

2:00 p.m. - 3:00 p.m. "Home Based Business Seminar"

Presenter: Fred Schmieder and Mel Waks South Bend SCORE

This one hour workshop will center on the specific considerations and steps to startup a home-based business with limited funds. LIMITED SEATING

Location: United Way Conference Room in Key Bank, Plymouth -Call Lyn (574) 936-3366

6:00 p.m. - 7:00 p.m. "Helping You Plan for a New Retirement"

Presenter: Bill Davis, Ameriprise Financial

Learn how to make your unique retirement dreams real, calculate your long-term retirement income needs and build strategies that can help you reach your retirement goals in changing economy. LIMITED SEATING

Location: Bremen Senior Center, 103 West Plymouth St, Bremen Call Lyn - (573) 936-33666

6:30 p.m. - 7:30 p.m. "How to Create a Retirement Roadmap"

Presenter: Jay King, 1st Source Bank

Financially where am I today? How much money do I really need to retire? Is my plan on track?

Location: 1st Source Bank, 315 N. Michigan, Plymouth

7:00 p.m. - 8:00 p.m. "Advantages and Disadvantages of Short Sales & Foreclosures"

Presenter: Chris McIntire, Coldwell Banker

Answering questions and providing information for all those that need help.

Location: Life Enrichment Center, Harrison Street, Plymouth

Friday, October 22, 2010

9:00 a.m. - 10:00 a.m. "Four Things You Need to Know to Feel More Confident about Reaching Your Retirement"

Presenter: Rodney Jacobs, Ameriprise Financial

Focuses on retirement and retirement income, 30 minute Q&A afterwards.

Location: Ameriprise Financial 104 S. Michigan Street, Plymouth

10:00 a.m. - 11:00 a.m. "Identity Theft"

Presenter: Officer Brooks Johnson, Indiana State Police

What is identity theft, how your identity is used, how people obtain your identity and how to prevent it & what to do if you are a victim.

Location: Plymouth Public Library, Laramore B Room

10:00 a.m. - 11:00 a.m. "Retirement Can Be Less Taxing"

Presenter: Craig Wilson, Edward Jones

Covers differences between Traditional and Roth IRA's, new tax law changes, the benefits of converting to a Roth IRA and related tax consequences.

Location: Plymouth Public Library, Laramore A Room

12:00 p.m. - 1:00 p.m. "Money Smart Philanthropy -Lunch & Learn"

Presenter: Joseph Goepfrich, Marshall County Community Foundation

Learn how to do charitable giving smartly and know the right charities to give to. LIMITED SEATING

Location: United Way Conference Room in Key Bank, Plymouth Call Lyn 574-936-3366 to RSVP

2:00 p.m. - 3:00 p.m. "Wills"

Presenter: Bill Fortin, Stevens, Travis, Fortin & Lukenbill

Uses, purposes and advantages of last will and testament, comparison to trusts..

Location: Stevens, Travis, Fortin & Lukenbill law office, 119 W Garro St, Plymouth

7:00 p.m. - 8:00 p.m. "Money Management for Young Couples"

Presenter: Melanie Wood, Secretary of State's office

Even the most compatible couple may find they have vastly different attitudes and experiences with spending, saving & investing habits. Learn how to navigate difficult financial topics, as well as merging not only your lives but bank accounts. LIMITED SEATING

Location: Ancilla College, Donaldson, Room 119 Call Sarah 574-936-8898 x 396

Saturday, October 23, 2010

Money Smart Fair

Free Presentations & Vendor Tables of Area Businesses

Location: Plymouth High School Auxiliary Gym, 1 Big Red Drive, Plymouth

8:30 a.m. REGISTRATION

9:00 a.m. - 9:15 a.m. MOTIVATIONAL SPEAKER -GREG JAGGERS

9:15 a.m. - 9:45 a.m. "Investing 101 - Investment Fraud"

Presenter: Melanie Woods, Secretary of State's office

Americans lose an estimated \$40 billion each year to investment fraud, learn how people fall victim to fraud, how to spot a con artist & how to recognize and avoid most common types of investment & mortgage fraud.

9:15 a.m. - 9:45 a.m. "Where Does Your Money Go?"

Presenter: Jennifer Maddox, United Way of Marshall County

Provide an introductory course in financial stability and money.

9:15 a.m. - 9:45 a.m. "Advantages & Disadvantages of Short Sales & Foreclosures"

Presenter: Chris McIntire, Coldwell Banker

Answering questions and providing information for all those that need help.

9:45 a.m. - 10:00 a.m. BREAK (Light Refreshments will be served)

10:00 a.m. - 11:00 a.m. BUDGETBALL played by Ancilla's Men's Basketball Team

Free basketball game that combines fiscal strategy and physical play. Watch the players manage debt, and savings to help their team win. Recognition at halftime of Money Smart Challenge participants.

10:00 - 11:00 a.m. "Social Security Benefits"

Presenter: David Seymour, Social Security Office

This is your chance to learn about Social Security benefits (retirement, survivor, disability) and the role they can play in developing a sound package.

10:00 a.m. - 11:00 a.m. "Identity Theft"

Presenter: Officer Brooks Johnson, Indiana State Police

What is identity theft, how your identity is used, how people obtain your identity and how to prevent it &

what to do if you are a victim.

11:00 a.m. - 11:45 a.m. "The Women's Guide to Money Matters"

Presenter: Craig Wilson, Edward Jones

Since women are living longer or experiencing a divorce, this presentation is designed for women of all ages to learn to better manage their financial futures. Three key strategies discussed will be pre-retirement, living in retirement and paying for a child's or grandchild's education.

11:00 a.m. - 11:45 a.m. "Touchstone Energy Presentation"

Presenter: Laura Matney, Wabash Valley Power and John Vialard, REMC

Discussion of the more popular energy savings myths and WHY they are myths. Topics like "Installing new windows will save me lots of money", "adding more insulation is always the best bang for the buck" and "my space heater is small, so it can't cost much to operate". The speakers will answer audience questions about energy usage.

11:00 a.m. - 11:45 a.m. "Getting out of Debt"

Presenter: Jennifer Maddox, United Way of Marshall County

Learn how to get out of debt and manage your money more effectively.

11:00 a.m. - 11:45 a.m. "Money Smart Philanthropy"

Presenter: Joseph Goepfrich, Marshall County Community Foundation

Learn how to do charitable giving smartly and know the right charities to give to.