

## **Personal Finance Seminar for Professionals**

### Presentation List

All sessions will be between 50 minutes to 60 minutes

#### **Michael Kothakota - *Cryptocurrency and Gambling Behavior: A treatment effect analysis***

Discussion on the relationship between gambling, investing and cryptocurrency ownership. We discuss the risks, potential rewards, valuation and who owns cryptocurrency.

#### **Tom Manganello - *Building Wealth Through Saving and Investing***

This training by the U.S. Securities and Exchange Commission will highlight the roadmap that the SEC uses to teach building wealth over time through saving and investing, including the importance of using tax-advantaged investments like 401(k)s and IRAs to grow wealth through compounding over time. This training also includes a discussion of the risk of crypto asset investments and considerations when using investing apps, as well as how to spot and avoid investment scams. Free resources at [www.Investor.gov](http://www.Investor.gov).

#### **Marsha A. Goetting - *Think You Know Who Gets Your Property When You Die? Think Again***

Do you know who will receive your property if you die without an estate plan? Do you know how title on your real and personal property is a factor that determines who receives it upon your death? But you have a will. Could it be useless? Find out during this session.

#### **Daniel David Bachman - *The US Economy: Current State and Prospects***

I will show the current condition of the US economy, with reference to popular impressions that may or may not agree with the facts. I will also describe potential risks, problems, and opportunities we face in the near term and in the long run.

#### **Lucy M Delgadillo & Sofia Monzon Rodriguez - *Financial Interpretation across Languages: Strategies for Success***

Given the importance of transparent and accurate communication in financial matters, especially when dealing with Limited English Proficiency (LEP) clients, financial professionals would benefit from learning how to work with interpretation services, how to manage the flow of a financial session with an interpreter, and how to become mindful of cultural differences and sensitivities to create a welcoming and inclusive environment for all.

#### **Jenny Abel - *52 Ways to Climate-proof Your Finances***

Extreme weather events and natural disasters have been increasing in frequency and are impacting individual and family finances across the country. In this presentation participants will learn ways they can protect their assets and control costs in the categories of housing, insurance, personal finances, food, clothing, transportation, taxes, and preparedness.