

# The Foundations of Money & Finance

SUMMER SESSION



July 8 - July 25, 2024

Welcome to our active learning workshop tailored to help young people (ages 18 to 25) get up to speed on the essentials of personal finance. Designed to provide foundational knowledge, Pitcairn's **2024 Summer Session** will empower you to make informed financial decisions as you launch into adulthood and achieve financial independence.

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# The Foundations of Money & Finance

PITCAIRN

Launching  
Adults  
18-25

## Summer Session

July 8 - July 25, 2024

**GOAL** To provide an opportunity to launching adults to discover the essentials of personal finance & investing.

**TIME**

- Two 90-minute sessions per week
- Mondays & Thursdays
- 4:00 - 5:30 PM ET

**COST** \$3150 per participant

**FORMAT** Online, active learning through multi-media, small group discussion, team games, real-life scenarios, and practical simulations.

### THEMES

- Personal Strengths
- Financial Literacy & Consumer Skills
- Goal Setting
- Spending Plans
- Banking, Saving, & Retirement Accounts
- Personal Financial Statements
- Choosing Investments
- Asset Allocation
- Credit & Debt
- Financing Options
- Estate Planning
- Income Tax
- Philanthropy
- Risk Management





## Session 1 - Strengths Discussion - Monday, July 8

Pre-work includes completing the CliftonStrengths Assessment. During the session, participants will discover ways to harness and develop their personal strengths.

## Session 2 - Financial Literacy & Consumer Skills - Thursday, July 11

Discover the connection between your emotions and your finances, set goals, and learn necessary skills for online shopping.

## Session 3 - Crafting Your Own Saving & Spending Plans - Monday, July 15

Master the art of budgeting so that it aligns with your short- and long-term goals. Explore the array of savings, checking, and retirement accounts available and come away knowing how to choose the right account(s) for your specific situation. Crack the code on reading and reviewing financial statements so that you can always stay well-informed about your current financial position.

## Session 4 - Investments - Thursday, July 18

Increase your knowledge about investing and learn the difference between different types of investments. Understand why certain asset classes perform in specific ways in your portfolio.

## Session 5 - Debt, Credit, & Financing Options - Monday, July 22

Examine the pitfalls of spending more than you have and learn to make a realistic and rewarding action plan for dealing with debt.

## Session 6 - Philanthropy & Estate Planning - Thursday July, 25

Discover why it is important to give back and create meaning within your community. Learn the best practices of estate planning.

**Contact [RisingGen@pitcairn.com](mailto:RisingGen@pitcairn.com) for more details**

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