FinancialKnowledge

WATCH NOW

Meet Financial Knowledge

Protecting employers with conflict-free financial education since 1989.

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About Financial Knowledge

35

Years instructor led classes

300

Financial subjects covered

30,000+

classes taught

50+

Course topics to choose from or tailor to your needs

Financial Knowledge was founded with a singular purpose: to provide comprehensive financial education with complete objectivity absent of any conflicts of interest by the firm, its principals or its instructors.

Our Unique Qualifications

A Personal Approach to Financial Education

- No hidden agendas and no sales pitch of any kind
- Courses specialized for specific groups within your client's populations including women, LGBTQ+ couples, Black, Asian, Hispanic and more

Exceptional Instructors

- CERTIFIED FINANCIAL PLANNER® professionals
- 10+ years industry experience
- Personable, bring material to life!

Accredited

ACCREDITED IACET PROVIDER

We are the only financial education firm authorized by the International Accreditor's for Continuing Education and Training (IACET)

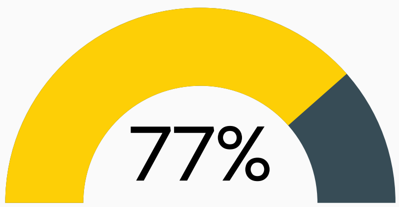
WOMEN OWNED

We are recognized by the Women's Business Enterprise National Council (WBENC) as a Women Owned Small Business

Benefits That Last a Lifetime

- Invaluable benefit with high impact results including reduced financial stress which results in:
  - increased productivity
  - more employee loyalty
  - greater participation in company benefit programs

Why Financial Knowledge Belongs in the Workplace



Source: 2023 Transamerica Survey

of workers view financial wellness programs as an important benefit

Employee financial stress cost companies more than:

Source: Financial Post

$40 billion

IN LOST PRODUCTIVITY IN 2022

Source: SoFi at Work Survey 2024

1 in 4 Employees reported that financial stress lowers their productivity in the workplace

Our Services

CFP® Instructor Led Courses

ONSITE COURSES: Our instructors foster an engaging learning community where participants share and create their financial wellness plan and future.

WEBCAST COURSES: Webcast courses offer a participant who's working remotely, traveling or simply more comfortable learning online in an interactive experience.

Recorded Courses

Self-paced and readily accessible, our recorded classes offer the same comprehensive content as our webcast classes at the convenience a participant requires.

Financial Coaching Sessions

Financial coaching sessions provide employees with individualized attention from an experienced financial educator in the manner that suits them best, either virtually or on campus.

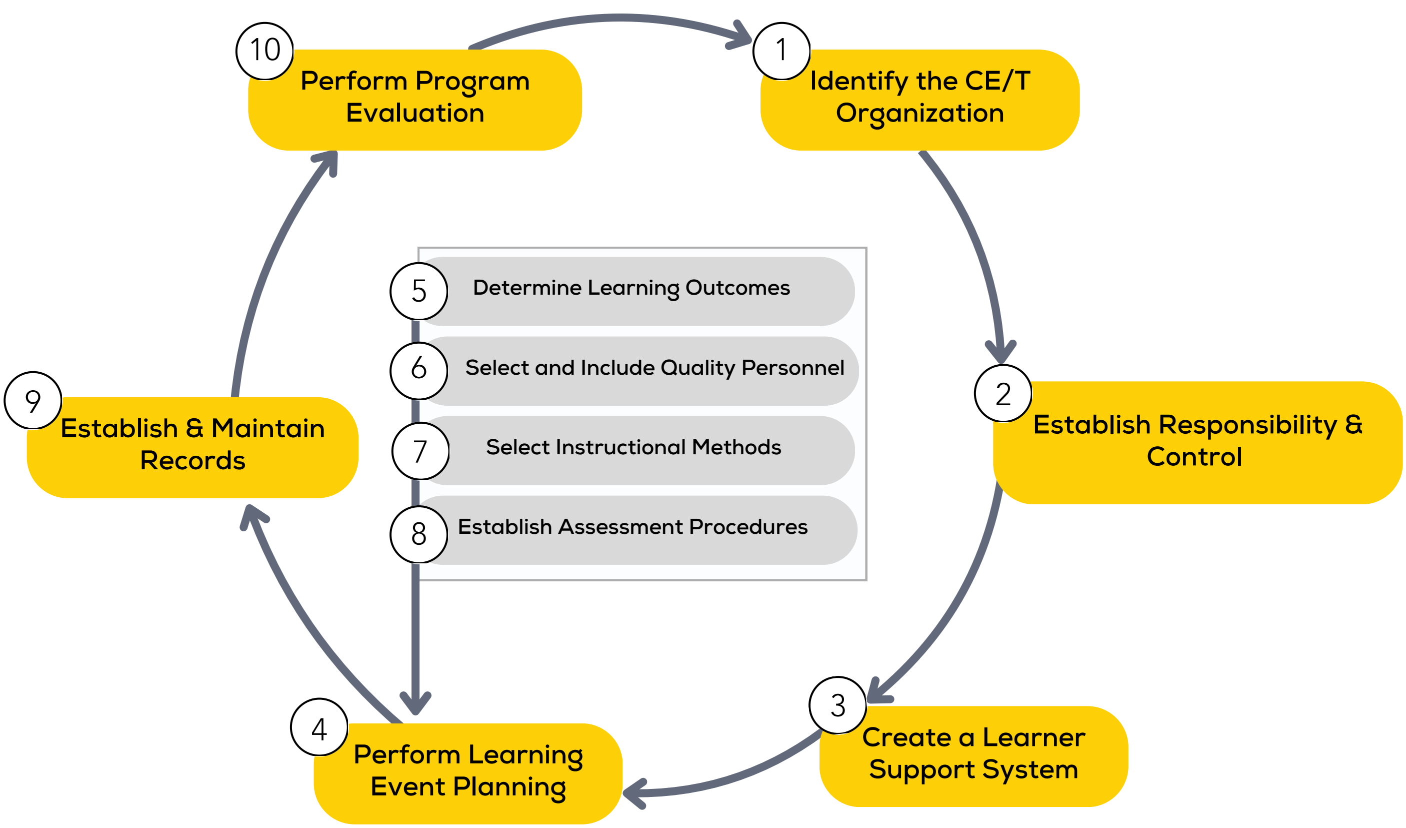
- Fiduciary Protection
- Globally Relevant Curriculum
- Customization
- Automated Registration System
- Promotional Support
- Course Workbooks with Additional Resources
- Needs Analysis Questionnaire
- Turn-key Learning Solutions
- Certified Woman Owned Small Business

Our Approach

Financial Knowledge is accredited through the International Accreditors of Continuing Education and Training (IACET). In order to maintain this accreditation, we must adhere to strict standards and teaching methodologies set forth by IACET. Some of the standards we must follow include:

- Responsibility and Control
- Learning Environment and Support
- Systems
- Learning Event Planning
- Learning Outcomes
- Planning and Instructional Personnel
- Content and Instructional Methods
- Assessment of Learning Outcomes
- Awarding CEUs and Maintaining
- Learner Records
- Program Evaluation

The standard categories, as illustrated in the model below, provide us with the framework to adhere to quality continuing education and training practices.



Expected Results

Results

Personal finances can be an emotional rollercoaster for individuals, especially with the added complexity of tax and healthcare laws, stock awards, various retirement options, and life's unexpected twists and turns. Our programs deliver results and reduce the financial stress your employees may be carrying, allowing them to focus on your business.

Impact

Changing behaviors and making an impact on your employees' financial future's is our top priority.

Here are just some of the changes in behavior and knowledge we've heard from countless students:

- Saved money towards financial goals
- Increased contribution amount in company retirement plans
- Reduced retirement plan loans
- Set up a will, living revocable trust, and power of attorney
- Utilized college savings plans
- Qualified for and bought a new home

Employee Testimonials

The instructor was absolutely **amazing**. Very personable. He brought **humor** in at the right moments which **made the course that much more enjoyable**. His analogies and examples also helped a lot. I'd love to meet this guy and talk shop. Really helpful. I'm gonna go and redo my budget right now.

Great class. Introduced theories **I didn't know about** and gave me **tools** to understand how to make decisions.

I thought the class was **excellent**. I don't think there's anything I would change.

Wow, great instructor. **Best financial instructor** I think I've had. Something about her voice and pace really kept me engaged... and she was very knowledgeable.

I was very **impressed**...useful information well delivered.

I think some of these courses should be made **mandatory** for folks as often we are not aware of how to manage our personal finances.

Course Feedback Results

COURSE OVERALL
9.1 /10

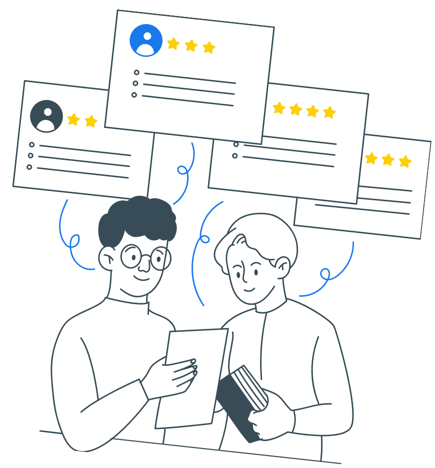
INSTRUCTOR PRESENTATION
9.3 /10

INSTRUCTOR KNOWLEDGE
9.5/10

USEFULNESS OF CONTENT
9.2 /10

LEVEL OF INTERACTION
8.8/10

MASTERING THE LEARNING OUTCOMES
9.1 /10



How Do We Get Started?

Getting started is easy, and Financial Knowledge will handle the heavy-lifting for you! Here's how we'll get up and running in 30 days:

Building the Curriculum

We will set up a call to further discuss your employee population, budget, vision for the program.

Customizing the Curriculum

Financial Knowledge will schedule another call to outline any content customizations your team would like in the completed course materials.

Raising Awareness

Your team will promote classes internally or provide Financial Knowledge with an email distribution list for initial marketing communication.

Adjusting and Maintaining the Program

We will complete an initial class curriculum and then set up a call to discuss the feedback and turnout for the pilot programs. We will address any concerns or changes.

Course Topics: Interactive Workbooks for Practical Learning

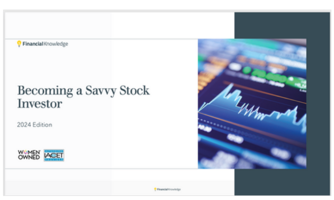
Here's a sneak peek of what we'll be diving into in our courses (keep in mind this is not a comprehensive list). Email info@financialknowledge.com for the full 50+ topic course list.

Financial Management

Courses Include:

- Gaining Financial Clarity Through Organization
- Crafting Practical Budgets & Smart Spending Habits
- Financial Goals Unlocked: Your Path to Prosperity

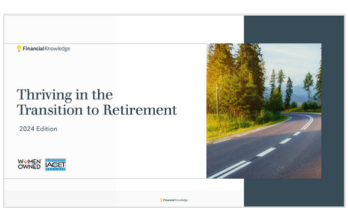
Investing



Courses Include:

- Investing Basic
- Demystifying Financial Markets
- Maximize Your Portfolio with Mutual Funds

Retirement Planning



Courses Include:

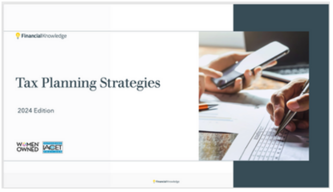
- Planning for a Fulfilling Retirement
- Retirement Readiness: Planning for All Ages
- Navigating Long-Term Care and Aging Decisions

Estate Planning

Courses Include:

- Estate Planning Essentials
- Making Confident Estate Choices: Executors, Beneficiaries and Guardians
- Elevate Your Legacy: Exploring Wills and Trusts

Tax Planning



Courses Include:

- Demystifying Federal Income Taxes
- Tax Planning Strategies
- Financial and Tax Planning for Employees Holding Work Visas

Stock Plans

Courses Include:

- Decoding Stock Awards and Their Tax Implications (Customized)
- Navigating ESPPs: Smart Stock Strategies and Tax Insights (Customized)

Real Estate

Courses Include:

- Preparing for Homeownership
- The Home Purchase Process
- Introduction to Real Estate Investing

Employee Benefits

Courses Include:

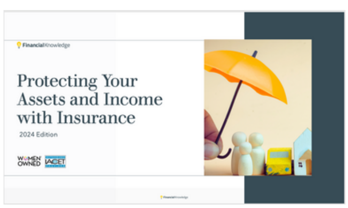
- Leveraging Company Benefits for Financial Prosperity (Customized)
- Maximizing Your Health Savings Account (Customized)

Kids and College Funding

Courses Include:

- Navigating Education Costs: Funding Strategies and Resources
- Raising Money Smart Kids

Risk Management



Courses Include:

- Protecting Your Assets and Income with Insurance
- Defending Against Identity Theft

Community Courses

Courses Include:

- Creating Financial Security for You and Your Loved Ones (available for the Asian American, Black and Hispanic Communities)
- Financial & Estate Planning for the LGBTQ+ Community

Financial Knowledge

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