

IT'S EVERYTHING YOU NEED TO KNOW ABOUT MONEY.

San Francisco Financial Planning Day

Saturday, November 7, 2015
9:00 am - 4:00 pm
San Francisco Public Library
Main Library @ Civic Center



Do you need free expert advice about money?

Come to San Francisco Financial Planning Day and get answers to your personal finance questions. Certified Financial Planners and Credit Counselors are volunteering to offer free one-on-one counseling and financial workshops throughout the day. The event is free and open to the public.

Please visit www.FinancialPlanningDays.org/SanFrancisco for more information and to reserve your spot today.



Frequently Asked Questions

What financial topics will be covered?

You will be able to talk to an expert about:

- retirement
- budgeting
- credit and debt
- investing
- taxes
- homeownership
- estate planning
- insurance
- education savings
- and much more!

What questions can I ask my financial planner?

You can show up with any question you have and you'll be sure to leave with useful information. Here is a list of some possible questions you can come prepared with:

- How do I improve my credit score?
- How do I create a debt management plan?
- How do I avoid foreclosure?
- How do I save for a house?
- How do I financially prepare for divorce?
- Should I set up a will or a living trust?
- How do I finance my child's college education?

How should I prepare to meet with a financial planner?

Bring relevant financial documents and a financial snapshot of your current financial situation.

Helpful documents include:

- Bank statements
- Credit card balances
- List of assets
- List of liabilities
- Social security statements
- Tax returns
- List of employee benefits
- Investment account statements
- Retirement account statements

How do I get to Financial Planning Day?

Financial Planning Day will be held at:

San Francisco Public Library (Civic Center)
100 Larkin St.
San Francisco, CA 94102

By Public Transportation

Take BART or MUNI to Civic Center. Walk one block up to the SF Public Library.

For more public transportation support please call 511 or visit 511.org to plan your trip.

By Car

Parking is available at the UC Hastings Garage on the corner of Larkin and Golden Gate.

Can you tell me more about the workshops?

We will be hosting workshops throughout the day. Some of our planned workshops include:

- Budgeting 101: Life's Balancing Act
- Tax Planning in a Changing World
- Intro to Financial Planning Basics
- The Affordable Care Act
- Credit Repair
- Real World Retirement Planning
- Investing Basics: Be a Smart Investor
- Estate Planning: What Everyone Should Know

We are also offering the opportunity to create a complete notarized estate plan with trained attorneys to a limited number of participants.

What have past attendees said about SF Financial Planning Day?

"I needed to have some financial planning questions answered for myself. I didn't know anything about those things so being able to see a financial planner and say "This is what I've got, how would you handle this?" was really important. Thank you for this great day. It has been really helpful."

"You've definitely got to come. They have great speakers, lots of great topics and you will come out better than when you came in."

Where can I go to find out about other upcoming events and resources?

To find out about other resources in the city, visit www.FinancialPlanningDay.org/SanFrancisco or www.FPASF.org

SF Financial Planning Day is hosted by the City and County of San Francisco Office of Financial Empowerment, the Financial Planning Association, Consumer Credit Counseling Service, and the San Francisco Public Library



To learn more and to register visit: www.FinancialPlanningDays.org/SanFrancisco