



Fundamental Financial Concepts (Module 1)

DATES:

March 31, 2023

TIME:

8:00 a.m. – 12:00 p.m.

COST:

\$25

LOCATION:

WCTC
800 Main Street
Pewaukee WI 53072

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Personal finances can be confusing at times. Issues related to personal finance are often cited as a leading cause of divorce and stress in the workplace. Given the nature of protective services work any reduction in stress is welcomed. An understanding of financial concepts can help reduce stress related to finances, achieve financial wellness, and ultimately assist individuals reach their financial goals.

This module is one of a series of three designed specifically for protective service employees on concepts related to personal finance. This module would benefit anyone interested in learning the basics of some fundamental financial concepts.

Some of the anticipated topics include:

- How to identify your attitudes toward money
- Why you should determine and track your net worth
- Cash flow management (household budgeting)
- Establishing financial goals
- Determining how much house you can afford
- Deferred compensation plans & other investment accounts
- Understanding and using credit
- Understanding your WRS (pension) statement and its value
- Health insurance and other potential government benefits

Instructor:

Jason E. Ganiere is a CERTIFIED FINANCIAL PLANNER™ skilled in investment management and financial planning concepts unique to protective service employees. Jason works at a Waukesha based investment firm (registered investment advisor) and since 2013 has worked directly with law enforcement and fire-fighter professionals helping them navigate decisions on pension benefits, investment accounts and other factors that impact their financial plan.

Jason retired from the New Berlin Police Department at the rank of deputy chief and during his law enforcement career also worked for a labor firm representing police labor unions in southeastern WI. Jason has presented on financial planning topics at conferences and seminars for police and fire as well as authored finance related articles for police labor association newsletters. Jason is passionate about educating fellow protective service professionals so they may have financial success during their working years and into retirement.

