Financial Behavior
KEYNOTE GROUP

Presentations by Erika Wasserman

- THE INTERSECTION OF MONEY & EMOTIONS: WHAT IS FINANCIAL THERAPY & DO I NEED IT?

  - *Type of Presentation:* Keynote - interview style
  - *Audience:* Financial professionals, Global employees
  - *Platform:* Virtual or Live
  - *Time:* 60 minutes

  SUMMARY: Financial Therapy exposes the unique relationship we all have with money by meeting you at the intersection of money and emotions. Replacing the stories in our heads with reality is proven to reduce stress. In this conversation, we will provide you with an overview of Financial Therapy, what it is, why it is so critical for businesses and individuals, and challenge the audience to develop a deeper understanding of one's relationship with money for themselves and their clients.

  Financial Therapy is on the rise as emotions and money run strong and more and more people face financial stress in ways they have never experienced before. The impact of financial stress continues to constrict budgets, weigh heavily on personal and work relationships, and contribute to poor physical and mental health. There are worrisome signs across the spectrum, from high earners to those currently unemployed.

- SWAN - SLEEP WELL AT NIGHT with your Finances

  - *Type of Presentation:* Webinar, Workshop, Keynote
  - *Audience:* Financial professionals, Global employees
  - *Platform:* Virtual or Live or Recorded
  - *Time:* 13-45 minutes

SUMMARY: If you are looking to Learn to SWAN (sleep well at night) you are in the right place with 4 actionable steps. Today I will be challenging/inviting you to review your relationship with money which may be contributing to a restless night (or two) because

Tossing and turning over money is more than a passing phase. .

This webinar will:

- Provide you with a unique 4-step formula to SWAN
- Invite you to uncover why your financial goal is important to you
- Set you up for success to reframe your financial woes leading to a better night sleep.

● YOUR RELATIONSHIP WITH MONEY - IT'S COMPLICATED!

➔ *Type of Presentation:* Webinar, Keynote
➔ *Audience:* Financial professionals, Global employees
➔ *Platform:* Virtual or Live
➔ *Time:* 25-45 minutes

Summary: Emotions around or about money often lead to stress, anxiety, awkward conversations, lost time with work, family, and loved ones due to illness or stress. In this session we break down how your relationship with money can have 4 levels of 'complicated'. Like a toothache, if left unattended it becomes more painful, and costly to fix.

This workshop will:

- Acknowledge your relationship with money
- Curious to explore where your money beliefs come from
- Gain ideas on which conversations would be important to have and how to start them
- Know that it is okay to talk about financial emotions (to alleviate shame and anxiety)

● STRENGTHEN YOUR FINANCIAL INDEPENDENCE

➔ *Type of Presentation:* Webinar, Keynote
➔ *Audience:* Financial professionals, Global employees
➔ *Platform:* Virtual or Live
➔ *Time:* 60 minutes

SUMMARY: How do you become independent and confident with money when life shifts, ebbs, and flows? As you move through life transitions, you can set yourself up for success by having a financial vision, setting realistic goals and expectations, knowing your facts, creating consistent behaviors, and identifying a money mentor.

This workshop will*:

- Explore your current state and desired future
- Provide 3 tips, 2 questions to ask yourself and 1 conversation starter for:
    - Moving In or Out
    - Partnering Up
    - Expanding Families

*NOTE: Additional scenarios can be customized based on your employees' or clients' situations.

- ## MASTERING MONEY & EMOTIONS - PART 1: RELIEVING FINANCIAL STRESS

  - ➔ *Type of Presentation:* Workshop
  - ➔ *Audience:* Financial professionals, Global employees
  - ➔ *Platform:* Virtual or Live
  - ➔ *Time:* 90 minutes

  SUMMARY: Financial stress and anxiety is top of mind as we see challenges in affordable housing, a rise in inflation, and a threat of a recession. This workshop will help you to take action on what is within your control — and reduce the noise when things are out of your control.

  This workshop will:

  - Highlight the different emotions people have toward money.
  - Share a 5-R approach to reduce financial anxiety.
  - Provide coping skills when emotions become unmanageable.
  - Recommend actions to put in place immediately.
  - Share a budget template to bring awareness to your spending, savings, and investments.

- ## MASTERING MONEY & EMOTIONS - PART 2: DEFINING YOUR ‘FINANCIALLY ENOUGH’

  - ➔ *Type of Presentation:* Workshop
  - ➔ *Audience:* Financial professionals, Global employees
  - ➔ *Platform:* Virtual or Live

➔ *Time:* 90 minutes (1 week after Part One)

SUMMARY: When things feel out of control, some will spend, some will share, and some will squirrel away. A missed opportunity may hurt emotionally in the short term but may be a blessing financially in the long term. This workshop explores our personal defaults that may move us into our comfort zone — not our optimal zone.

This workshop will:

- Uncover your knee-jerk reaction to spending and saving during uncertainty.
- Challenge you to shift your patterns of spending, saving, and investing.
- Define what 'financially enough' is to you.
- Provide tips & techniques to shift your patterns of spending, saving, and investing.

● BUILD YOUR YES! PLAN

➔ *Type of Presentation:* Workshop, Webinar, Keynote
➔ *Audience:* Global employees (early career)
➔ *Platform:* Virtual or Live
➔ *Time:* 45 - 60 minutes

SUMMARY: This session will challenge your mindset from viewing a budget as constricting to building a "Yes Plan" for the lifestyle you want. You want to plan a trip? YES! You want a downpayment on a house, YES! You want to be debt free, YES! A new car? YES!

This session will encourage you to:

- Reframe your relationship with managing money
- Feel empowered about your financial decisions
- Set an obtainable 'YES PLAN'

● PLANNING A FINANCIAL WELLNESS DAY

➔ *Type of Presentation:* Workshop, Keynote
➔ *Audience:* Global employees
➔ *Platform:* Virtual or Live
➔ *Time:* Half day

SUMMARY: A personal financial wellness day is a day of the year to focus on your personal financial health, which is just as critical as your bodily and mental health.

Consider this your financial check-up to:
- Get a pulse on your financial reality
- Address all of the things you have been putting off
- Gain a clear snapshot of where you are so that you can be ready for anything

As a result, you will….
- Better understand where you are
- Update information in case of emergency or death
- Release internal stress of putting things off
- Gain peace of mind
- Have the satisfaction of getting things done
- Handle twists, turns, and obstacles with more ease

● UNLOCKING FINANCIAL ABUNDANCE: DISCOVERING YOUR MONEY MINDSET IN A GROUP SETTING WITH THE MONEY EGG EXERCISE

- ➔ *Type of Presentation:* Workshop
- ➔ *Audience:* Financial professionals, Global employees
- ➔ *Platform:* Virtual or Live
- ➔ *Time:* 90 minutes

SUMMARY: To articulate your money mantra, this session will explore the roles you play, the rules you have followed in life so far, the patterns you have created, and the story you tell yourself about money. From here, you will be asked to consider what you would like to let go of and what you wish to bring forward and pass on. The result is a personal money mantra that will guide your mindset and the decisions you make to enhance your health and wealth.