



Handouts and Worksheets

Handouts and worksheets specific to the presentations:	Lesson Number	Slide Number
Ballpark E\$timator of Retirement Needs	1	16
Financial Goals Worksheet	1	17
Financial Tasks Over Life Cycle	1	End
Tania Newman's Net Worth Information	2	6
Net Worth Paper Worksheet	2	7
Net Worth Excel Spreadsheet	2	Online
Debt Repayment Plan	2	End
How Much Debt is Too Much	2	End
2014 Retirement Account Rules	3	31
Risk Tolerance Quiz	4	6

Pre-printed Handouts from Finra:

Are You Financially Fit?: A Workbook to Help You Become and Stay Financially Fit for Life
 BrokerCheck®: An Online Tool to Help Investors Check the Background of Individual Investment Professionals and Firms
 Fighting Fraud 101: Smart Tips for Investors
 Five Tips to Keep Your Finances from Going Off a Cliff
 Investor Knowledge Quiz: A Helpful Guide to Learning More about Investing
 Money & Mobility: For Military Personnel and Families
 Savings Fitness: A Guide to Your Money and Your Financial Future
 Smart Bond Investing
 Smart Saving for College – Better Buy Degrees: 529 Plans and Other College Savings Options
 Trick\$ of the Trade: Outsmarting Investment Fraud