

Financial Planning 101 Seminar on the Road Summer 2010



Financial planning is the process of assessing your financial goals, taking an inventory of your money and other assets you already have to meet those goals, and determining your future needs. To help State employees understand how this process applies to them, MSRP has designed this comprehensive seminar.

Module 1 – Introduction – Describes the need for Financial Planning and the roadblocks that may prevent people from achieving their financial goals.

Module 2 – Insurance: Risk Management – Identifies the types of insurance needed to protect the individuals' financial investments.

Module 3 – Investment Basics – Defines various terms of investing and aids the individual in choosing investments according to their financial goals.

Module 4 – Understanding Taxes – Describes the various methods of taxation and how chosen financial investments are affected by taxes.

Module 5 – Retirement Planning – Describes the MSRP Retirement Plans and all other retirement options available when planning for retirement.

Module 6 – Estate Planning – Describes the various choices available to protect your dependents and your assets during incapacitation and death.

Module 7 – College Planning – Describes the various financial options available to pay for college.

June 22, 2010 9:00 AM – 4:30 PM	Allegany County Health Department, Cumberland
July 13, 201 9:00 AM - 12:30 PM	Modules 1, 2 & 3 201 W. Preston St., Baltimore
July 20, 201 9:00 AM – 11:45 AM	Modules 4, 5, 6 & 7 201 W. Preston St., Baltimore
July 22, 2010 9:00 AM - 12:30 PM	Modules 1, 2 & 3 Goldstein Building, Annapolis
July 29, 2010 9:00 AM – 11:45 AM	Modules 4, 5, 6 & 7 Goldstein Building, Annapolis
Sept. 17, 2010 9:00 AM – 4:30 PM	Eastern Shore Hospital, Cambridge

Registration Instructions:

If you would like to attend **please verify with your supervisor that you may attend** and send us your registration information as soon as possible. Some sessions may fill up quickly. Please send the requested information to info@msrp.state.md.us. If you do not have email you may register by calling Jacquetta Robinson at 410-767-8740. Spouses are welcome to attend.

Please Include:

Your name

Your e-mail address

Your mailing address (work)

Your daytime phone number

The date you plan to attend

(please register for both days if you want to attend the entire program for half day sessions)

What agency you are employed by

How many years you have been employed with the State

If you require any special assistance for a disability

You will receive a confirmation e-mail from our agency within 5 business days. If you do not hear back from us within that time frame, please contact Jacquetta Robinson at (410)767-8740.

Maryland Teachers & State Employees Supplemental Retirement Plans

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