

## **MONEY 101 OUTLINE - FORGE GATEWAY FINANCIAL FREEDOM**

- I. Introduction
- II. Spending Plans
  - A. Money Motivation Quiz
    - When emergencies arise, our outlook / money motivation changes.
  - B. Cultural Pressures / Myths – What do others say? What lies do we believe?
    - 1. \_\_\_\_\_
    - 2. \_\_\_\_\_
    - 3. \_\_\_\_\_
    - 4. \_\_\_\_\_
  - C. Benefits of a Spending Plan
    - 1. \_\_\_\_\_
    - 2. \_\_\_\_\_
    - 3. \_\_\_\_\_
    - 4. \_\_\_\_\_
  - D. Creating a Spending Plan
    - 1. Know \_\_\_\_\_ and \_\_\_\_\_
    - 2. Distinguish \_\_\_\_\_ vs. \_\_\_\_\_
    - 3. Set \_\_\_\_\_ (list several)
    - 4. Prioritize \_\_\_\_\_
    - 5. Establish \_\_\_\_\_
      - a. Include \_\_\_\_\_
    - 6. Develop \_\_\_\_\_ for following plan
    - 7. \_\_\_\_\_ plan
  - E. Spending/Savings Tips
    - 1. Evaluate cable, internet options
    - 2. Control Utilities
    - 3. Plan – clothing, books/magazines, gifts
    - 4. Auto – maintenance
    - 5. Food – food @ work, groceries
    - 6. Allowances
- III. Resources
  - A. Schooling – scholarships are almost exclusively available for cancer survivors, not children of survivors. Some good, small scholarships for survivors.
  - B. In the middle of treatment...
    - 1. Support groups
    - 2. United Way 211 line
    - 3. Websites (sample) – Google cancer resources
      - a. [cancercare.org](http://cancercare.org) – help with transportation costs
      - b. [cancer.org](http://cancer.org) – same as above and more
      - c. [thepinkfund.org](http://thepinkfund.org) – help with non-medical bills if there has been a loss of income due to treatment
      - d. [lookgoodfeelbetter.org](http://lookgoodfeelbetter.org) – free workshops offering makeup, beauty and skincare tips for women being treated for cancer
      - e. FORGE

- IV. Documents to have in place and discussions (including financial) to have
  - A. Documents
    - Will
    - Living Will
    - Durable Power of Attorney
    - Healthcare Proxy
  - B. Discussions
    - Long-term care (in-home and/or out of home)
    - Where are financial documents stored? (Insurances, property ownership, loans/debts, bank accounts, stocks, tax info, user names and passwords, etc.)
    - End-of-life wishes/requests
- V. Rebuilding Credit
- VI. Q&A