



America Saves Week is February 21 – February 28, 2010.
Go to www.americasavesweek.org and learn how you and your organization can participate.

Financial Seminar in Philadelphia sponsored by Philadelphia Saves

The following comes from [Philadelphia Saves \(PS\)](#).

On February 27, 2010, PS conducting a Financial Seminar, see below for agenda and details. There will be an Expo area and PS is seeking organizations that would be interested in having a booth in the Expo area. If you are interested in learning more about this opportunity, please contact Caroline McHugh at cmchugh@cccsdv.org or by phone at 215-563-5665 x3328.

Philadelphia Saves Week 2010- February 21-28

Theme: Start Small, Think BIG! (new America Saves messaging)

With the current economic environment, we would like people to start to think of “savings” in a broad sense and know that small steps can lead to big success. We look to encourage people to become Philadelphia Savers. Once people start to think of savings in nontraditional ways and are successful, it builds their financial confidence.

Overall Goal of Week: Increase awareness of Philadelphia Saves program and introduce new marketing campaign. Along those lines, we want people to attend workshops and sign up as Savers. The Call to action is to “start” wherever you are and we can help you identify tactics/tips. We are providing information, connecting the public to resources, motivating them to save and providing a community of savers to support individual goals.

Half –day program starting with a **General Session** then providing attendees an opportunity to attend any of **10 classroom sessions** on a number of topics. Throughout the day attendees can visit an Informational Expo and Certified Financial Planners will be available to briefly meet with attendees to answer individual questions. Workshops will cover topics related to Philadelphia Saves and “savings related” Topics.

- **Philadelphia Saves Main Event**
- **Saturday 2/27, 9:00 am - 2:00 pm**
- **Boot Camp for Life**

- **Place:** Temple University,
- Walk auditorium and 6 classrooms in Ritter Hall.

- **General Agenda** (9:00 am – 2:00 pm)
9:00 – 9:30 Continental Breakfast

9:45 – 10:30 General Opening Session & Keynote Speaker

General Session will set the tone for the day.

15 minutes- Moderator needs to be comfortable with mixed audience and able to approach personal finance in a light, personable manner. Moderator will speak briefly on the Importance of Saving, Philadelphia Saves, provide the logistics of the day and introduce the Keynote (Jim Donovan)

25 minutes- Keynote will speak on Savings. They will motivate the crowd into taking action and provide timely savings tactics & Tips

5 minutes- Certified Financial Planners will address the audience on why they are participating and their value to the average saver. They will also explain “Ask the Expert” table in the Expo where attendees can ask general questions to any of the planners.

10:45- 11:30 Workshop Session#1 (attendees can attend any of 5 concurrent workshops)

Workshop Topics:

Philadelphia Saves

- Traditional Philadelphia Saves Workshop.

Budgeting Basics

- General Budgeting Workshop with an emphasis on Saving as key component of a strong saving plan

Credit Workshop

- Understanding your credit and seeing debt repayment as it relates to healthy finances as well as saving for debt repayment

Moving to the Next Level of Savings & Investment

- Working with Certified Financial Planners. Workshop will talk about vehicles available beyond the savings account.

Maintaining Your Savings over your Life

- Working with AARP. Workshop will address the more mature Saver

Getting it Done Home Ownership

- Preparing for Homeownership workshop covering key steps prior to purchasing a home

Kids & Saving

- Working with Operation Hope and Youth Education Coordinator, this will provide hands on activities and learning

11:30- 12:15 Expo & Refueling

This will be a light refreshment break (in lieu of lunch) and opportunity for attendees to explore the Expo area.

12:15 – 1:00 Workshop Session#2 (attendees can attend any of 5 concurrent workshops) same format as Session #1

1:00 - 2:00 Closing Raffle & Expo

At 1:15 there will be Closing Comments (primarily a Thank you to Attendees and Raffle) in the Expo Area. Attendees are free to explore Expo until 2:00. The closing comments can be done by the Senior CCCS staffer available.

• **Expo**

From 11:00- 2:00 there will be an Expo which allows time for attendee to visit informational tables and sign up for Philadelphia Saves. In addition to the financial partners who will all be offered a table, we are outreaching to other organizations of interest like Bank on Philadelphia, Careerlinks, etc who help people save by spending less or earning more.

Interested Expo Partners:

Campaign for Working Families (VITA Sites)

Go Direct

AARP

Certified Financial Planners

ING

Fox Chase

Susquehanna Bank

Philadelphia Federal Credit Union

M&T Bank