Speaker's Presentation
GUIDE

FINANCIAL WELLNESS
Education and Support Program

Whether you are making a speech in-person or virtually, these materials will help you to prepare for a customized presentation. The Pre-loaded PowerPoint deck can be tailored for each event you present at -- just add your city/state logo or seal, contact information, and customize the slides for your particular audience. This is an open-source document so you can create a different deck for each event. Please refer to the Audience Guide to further personalize the presentation for Women, Veterans and Persons with Disabilities -- the three groups identified by public sector employees as audiences you want to reach. You'll find facts and additional resources to help you prepare. Use the Financial Wellness Infographic as a hand out or attachment, and the Financial Wellness Worksheet for a hands-on activity.

Plan to Cover a Wide Range of Financial Wellness Program Topics:

Budgeting and planning

Debt

Investments

Risk management

Home ownership and mortgages

Long-term care/elder care

Flexible spending accounts

Planning for a family and child care

Planning for retirement

Estate planning

Identity theft/cybersecurity

Non-wage employee benefits

Consider Workforce Demographic and Life Stages:

Demographic groups to consider include:

- Low-income households
- People with disabilities
- Senior citizens/retirees
- Historically disadvantaged groups
- Women
- Veterans
- Communities of color
- Residents of rural areas

Life stages to consider include:

- Starting a career
- Career-building
- Mid-career
- Pre-retirement
- Retirement

Know Your Audience and Keep Them Engaged:

Consider implementing confidential audience surveys or focus groups prior to your presentation in order to better familiarize yourself with the demographics, needs, and concerns of your audience. Doing some preliminary research and evaluation might help you better understand the level of financial stresses and behaviors of your audience and their dependents.
Please refer to the Audience Guide for additional assistance with your planning.

Plan to end your information session with a **call to action** — for example, ask your audience to share the Financial Wellness Worksheet with colleagues, family, and friends to spread the word about the importance of financial planning, and/or ask attendees to take two or three action steps toward achieving one of their financial goals before the next session.

Finally, **collect feedback** on your presentation in order to inform future sessions. Consider using an online survey-building platform to create and distribute a survey after your session — check out SurveyMonkey or Typeform.