

# **CAP COM Financial Services**

## **Workshop Program**

All workshops are complimentary and tailored to your company by CAP COM Federal Credit Union and CAP COM Financial Services. Sessions run from 20 minutes to one hour. We request that at least 10 people are registered for a workshop.



A Registered Investment Advisory Firm.

- **The Roth IRA: Americans Next Tax Break**

Roth IRA conversion rules, the 2010 changes and the advantages and tax consequences of a conversion.

- **21<sup>st</sup> Century Retirement**

Strategies for managing retirement income and the challenges retirees face today.

- **Insurance Services (Life, Health, Disability, etc.)**

Protecting your family just in case the unexpected happens.

- **Investment Fundamentals**

Learn the basics of investing to help you make better informed decisions.

- **Long Term Care Planning**

Ensuring your health and your wealth.

- **Retirement Red Zone**

Planning solutions for employees nearing retirement age.

- **Saving for College**

Covering the cost of your child's college education.

- **Saving for Retirement**

Building a comfortable lifestyle for tomorrow.

- **Taking Control of Your Finances**

Dealing with credit, debit, budgeting and savings.

- **Tax Strategies**

Understanding tax-efficient investing and how to lower your taxable income.

- **Knowing Your Credit**

Credit cards, credit scores and the road to a successful financial future as a young adult.

- **Also Included:**

- 8.5 x 11 full-color signs designed to get your employees' attention and encourage participation. These are also available in a PDF format.
- Copy of audio/visual presentation and handouts provided to your human resources department contact to review prior to workshop.
- Our staff sets up the presentation at your company's location. We provide workbooks for employees to follow the presentation, brochures and pens.
- Evaluations are provided to each attendee for feedback.
- All attendees are entitled to a complimentary consultation with CAP COM Financial Services to assess their particular needs.

**To schedule a workshop, please contact Cindy Brown at (518) 782-0209 or [ccfs-workshops@capcomfinancial.com](mailto:ccfs-workshops@capcomfinancial.com).**

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