

Financial Management Workshops

2019

Workshops are presented by certified Personal Financial Counselor.

A&FRF Training Room 1300 – 1400

15 January



Saving and Investing: Simple Tips to Secure a Strong Financial Future

This presentation distinguishes between saving and investing approaches and identifies saving and investing options available to service members. Included in the presentation is a list of resources to assist with saving and investing activities.

12 February



Developing Your Spending Plan

This presentation emphasizes the need for establishing a financial plan and introduces components of a spending plan and the Financial Planning Worksheet. It presents tips to manage spending, suggestions for an "ideal" spending breakdown and SMART goals to assist in establishing financial priorities.

12 March



Dream Big, Plan Now: Making Your Ideal Retirement Reality

This presentation is an active duty-focused approach to retirement planning. Topics include sources of income, steps to planning retirement and the Thrift Savings Plan (TSP). It introduces and compares the Final pay, High-36 and CSB/Redux military retirement plans, as well as the Blended Retirement System (BRS).

17 April



Where Are We with TSP and BRS?

Discussion on the Blended Retirement System (BRS), including continuation pay and the Thrift Savings Plan (TSP) with matching government contributions. Set your goals and get yourself financially ready for retirement and more.

16 May



Budget 101

Budget planning is the first step of financial planning. It is never too late to start! This workshop will provide you with helpful information to assist you in the development and follow-up of your budget. You will learn how to identify where you can make adjustments to start saving money and reach your financial goals.

11 December



Take Control of Your Finances: Managing Credit and Debt

This presentation provides information on credit establishment, credit management and debt relief. It introduces debt-to-income ratio concepts, the importance of monitoring credit reports and scores and briefly addresses the Servicemembers Civil Relief Act (SCRA) and bankruptcy.

Airman & Family Readiness Flight • (505) 846-0741 • (505) 846-0751

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Consolidated Support Facility, Bldg 20245, Suite 126
1451 4th Street SE Kirtland AFB, NM 87117

10 Leadership Pathways Points

