

# *Society for Financial Awareness*

We are a 501(c)(3) non-profit organization with a mission to Eliminate Financial Illiteracy and to Enlighten your organization through Financial Education by way of our **NO COST, NON SALES** seminars. We aim to empower your team to take charge of their finances, which will yield a positive impact on productivity, overall well-being, and morale...a win/win for your organization and your team!

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Company: \_\_\_\_\_

Phone: \_\_\_\_\_ City: \_\_\_\_\_

Approximate Date/Month of First Seminar: \_\_\_\_\_

## **Please Check Seminar Topics That Interest You (see attached):**

- 1. *Getting "Fiscally Fit"*
- 2. *Investment Concerns in a "Fragile" Market*
- 3. *College Planning*
- 4. *Financial Blunders – Lessons We Never Learned*
- 5. *"Exploring" Your Options for a Quality Retirement*
- 6. *Asset Allocation & Modern Portfolio Theory*
- 7. *Women Approaching Retirement and Beyond*
- 8. *Investing Basics for Women*
- 9. *You and Your Credit Score*
- 10. *How to Increase Your Health and Wellness*
- 11. *Stress and Your Health*
- 12. *Real Money – Real Estate*
- 13. *First Time Home Buyers – Issues of Real Estate*
- 14. *Financing Your First Home*
- 15. *Refinancing*
- 16. *Tax Planning*
- 17. *Estate Planning*
- 18. *Legal Lessons of Life*

***Kurtis Kooiman** - President / Irvine Chapter  
7777 Center Avenue, Suite 220, Huntington Beach, CA 92647  
(714) 892-1002 Office ~ (714) 892-1092 Fax  
[www.sofausa.org](http://www.sofausa.org)*