

Training Agenda
Starting Your Investment Program With \$1 to \$1,000
Thursday, May 11 and Friday, May 12, 2006
Purple Pride Room
K-State Alumni Center
Kansas State University, Manhattan, KS

Young Employee Investor Education Project
Funded by National Association of Securities Dealers
Investor Education Foundation

Thursday, May 11, 2006 12:30 – 5:30 pm CDT

11:30 - 12:30 p.m. CDT (Box lunch provided upon request on attached registration form)

12:30 – 1:00 p.m. CDT

Outline of project *Dena Wise and Robert Gamen*

History

Funding

Roles and responsibilities

Kansas Saves *Carol Young*

1:00 – 2:15 p.m. CDT

Presenting the case for employee education to employers

Research updates *Ann Berry and Dena Wise*

Human resources representative *Dena Wise*

Marketing and agent sharing *Jo Turner and Elaine Courtney*

2:15 to 2:30 p.m. CDT

Break

2:30 – 4:00 p.m. CDT

Mobilizing and leveraging community support

Presentations to civic and business groups: Changing Workplace presentation

Dena Wise

Agent sharing *Jo Turner, Elaine Courtney, Carol Young*

Coalitions

Community partnerships between financials and private business

Create sales presentations *Jo Turner and Elaine Courtney*

- 10 minute message

- 10 second message

4:00 to 4:15 p.m. CDT

Break

4:15 – 5:30 p.m. CDT

Educational Methods for Use With Young Employees *Sue Badenhop and agents*

Curricula and teaching resources (Share Toolkit for Training) *Sue Badenhop*

Friday, May 12, 2006 8:00 to Noon CDT

Starting Your Investment Program With \$1 to \$1,000 Curriculum

Esther Maddux and Ann Sanders

Program Overview: Lesson Plan, Handout, PowerPoint, Teaching Tools, Evaluation for each of the ten lessons

Risk Tolerance Quiz

Case study

Participants will analyze case study, divide into 4 groups; conservative, moderately conservative, moderately aggressive, and aggressive portfolios (18-24 year old scenarios)

8:00 to 9:15 a.m. CDT

Lesson One: Where Do I Begin?

Lesson Two: Why Save?

Lesson Three: Which Is The Best Alternative For Me?

9:15 to 9:30 a.m. CDT

Break

9:30 to 10:45 a.m. CDT

Lesson Four: What's What In Savings and Investments? Savings

Lesson Five: What's What In Savings and Investments? Investments

Lesson Six: What's What In Savings and Investments? Retirement Plans

10:45 to 11:00 a.m. CDT

Break

11:00 to Noon CDT

Lesson Seven: Where Will I Place The Money I Save?

Lesson Eight: How Do I Protect My Nest Egg?

Lesson Nine: How Do I Choose A Financial Adviser?

Lesson Ten: How Do I Read the Financial Page?

Noon CDT

Adjourn – Have a safe trip home!

Project Leaders and Training Facilitators

NASD Investor Education Foundation

Robert Gamen, Program Officer

University of Tennessee

Dena Wise, Family Economics Specialist

Ann Berry, Family Economics Specialist

University of Kentucky

Suzanne Badenhop, Family Economics Specialists

University of Florida

Elaine Courtney, Okaloosa County Extension Agent

Mary Harrison, Consumer Education Specialist

Jo Turner, Consumer Economics Specialist

Kansas State University

Carol Young, Family Financial Management Specialist

LaVonne Boetel, Senior Administrative Assistant

Ann Sanders, Graduate Teaching Assistant

Esther Maddux, Personal Financial Planning Specialist