



# IT'S EVERYTHING YOU NEED TO KNOW ABOUT MONEY.

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## San Francisco Financial Planning Day

Saturday, October 22, 2016

9:00 am - 4:00 pm

San Francisco Public Library at the Civic Center

100 Larkin Street

Do you need free expert advice about money? Come to San Francisco Financial Planning Day and get answers to your personal finance questions. Certified Financial Planners and Budget Counselors are volunteering to offer free one-on-one counseling and financial workshops throughout the day. The event is free and open to the public.

Register at [www.FinancialPlanningDays.org/SanFrancisco](http://www.FinancialPlanningDays.org/SanFrancisco)



San Francisco Public Library

# Frequently Asked Questions

## What financial topics will be covered?

You will be able to talk to an expert about:

- Retirement
- Budgeting
- Investing
- Tax Planning
- Estate Planning
- Education Planning

## What questions can I ask my financial planner?

You can show up with any question you have and you'll be sure to leave with useful information. Here is a list of some possible questions you can come prepared with:

- How do I improve my credit score?
- How do I create a debt management plan?
- How do I financially prepare for divorce?
- Should I set up a will or a living trust?
- How do I finance my child's college education?

## How should I prepare to meet with a financial planner?

Bring relevant financial documents and a financial snapshot of your current financial situation.

Helpful documents include:

- Bank statements
- Credit card balances
- List of assets
- List of liabilities
- Social Security statements
- Tax returns
- List of employee benefits
- Retirement account statements
- Investment account statements

## Can you tell me more about the workshops?

We will be hosting workshops throughout the day. Some of our most popular workshops include:

- Budgeting 101: Life's Balancing Act
- Tax Planning in a Changing World
- Real World Retirement Planning
- Investing Basics: Be a Smart Investor
- Estate Planning: What Everyone Should Know
- Navigating College Savings Resources

## Will there be Spanish or Chinese language planners available to help me?

Yes, we will have financial planners who speak Spanish, Mandarin and Cantonese who can help you.

## Where can I go to find out about other financial education events and resources?

To find out about other resources in the City, visit the Smart Money Network website at <http://sfgov.org/smn>.

## How do I get to Financial Planning Day?

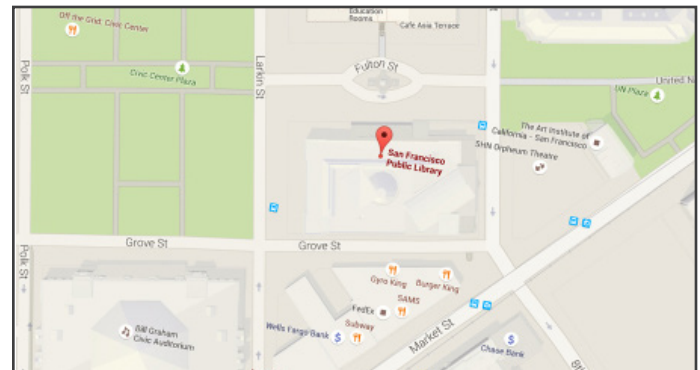
Financial Planning Day will be held at:  
San Francisco Public Library (Civic Center)  
100 Larkin St.  
San Francisco, CA 94102

## By Public Transportation

Take BART or MUNI to Civic Center. Walk one block up to the SF Public Library. For more public transportation support please call 511 or visit [511.org](http://511.org) to plan your trip.

## By Car

Parking is available at the Civic Center Garage (355 McAllister Street, between Polk and Larkin Streets) and Performing Arts Garage (360 Grove Street, between Franklin and Gough Streets)



## Thank you to our cosponsors:

- San Francisco Office of Financial Empowerment
- San Francisco Smart Money Network
- Consumer Credit Counseling Service of San Francisco
- Certified Financial Planner Board of Standards
- Financial Planning Association
- Foundation for Financial Planning
- The United States Conference of Mayors
- San Francisco Public Library

To learn more and to register visit: [www.FinancialPlanningDays.org/SanFrancisco](http://www.FinancialPlanningDays.org/SanFrancisco)