



**BOXERADVISORS**  
Translating Insights Into Action

# MICRO-TRAINING COURSE CATALOG

Boxer Advisors, LLC  
6701 Democracy Blvd., Suite 300  
Bethesda, MD 20817  
Cell: (240) 355-1192  
Website: [BoxerAdvisors.com](http://BoxerAdvisors.com)

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## 1 Hour Sessions

### **Emotional Intelligence**

#### ***Overview***

Emotional Intelligence is a necessary foundation for both work and non-work life success and well-being. This lunch and learn session provides an overview of the six components of emotional intelligence. The interactive session contains an informal self-assessment, workplace examples and additional resources.

A general explanation of EQ why it's important and how it can be incredibly valuable to you, your team and workplace. We cover the basics, and the latest research, then go over steps on how to increase EQ. Participants will get a .pdf of tips on controlling emotions more constructively and how to structure conversation in a more productive way.

#### ***Additional Details***

Course Length: 1 hour

Mode of Instruction: Virtual

### **Resilience in Times of Change**

#### ***Overview***

Resilience is a key skill and a strategy for managing change, growth, and challenges. The good news is that resilience can be developed and renewed. This lunch and learn provides a forum to examine resilience, adaptability, and agility. Discussion includes key skills, mindsets, and application at work and non-work situations.

How do you maintain your focus when everything is constantly changing?

How do you remain positive and engaged when priorities are often redirected?

As the political, personnel, leadership, and regulatory climate changes, we often have to adjust our focus, redirect priorities, deal with challenging times, and remain optimistic.

In this lunch and learn, participants will discuss ways to:

- Ways to get past the “danger zone” when dealing with change
- Manage our emotions and reactions to change in order to feel positive and energized

#### ***Additional Details:***

Course Length: 1 hour

Mode of Instruction: Virtual

## **The Smart Way to Delegate**

### ***Overview***

This lunch and learn session is a practical discussion of the benefits, challenges and skills for effective delegation. Since one size does not fit all situations, assignments or staff needs, we focus on a smart approach to effective delegations – analysis, clear communication, and follow-up.

Delegation is an essential skill for leaders to manage and everyone wins when delegation is properly used. Yet many steer clear of delegating for a number of reasons - not enough time, nothing to delegate, or even fears around delegating. In this session, we explore the benefits of delegation and reframe the hesitance that can sometimes get in the way of this valuable tool. Participants will have a valuable tool that they can use to assess and implement more delegation right away.

### ***Additional Details:***

Course Length: 1 hour

Mode of Instruction: Virtual

## **Managing Your Priorities, Time and Energy**

### ***Overview***

This session focuses on the importance of managing/balancing your priorities, time and energy. This balanced approach leads to productivity, less stress and greater work satisfaction. The session includes a priority matrix, management tips, and a way to refresh and renew mental and physical energy.

### ***Additional Details***

Course Length: 1 hour

Mode of Instruction: Virtual

## **Managing Interruptions to Improve Focus and Energy**

### ***Overview***

This session explores the advantages of managing unnecessary interruptions to maintain focus, time management, and energy. Tools and exercises are included to give a practical and interactive workout based on attendee examples. Additional resources will be suggested; for example: Two awesome Hours by John Davis.

### ***Additional Details***

Course Length: 1 hour

Mode of Instruction: Virtual

## **Confident Communication for Collaboration and Engagement**

### ***Overview***

Confident communication is an asset and fundamental for success at work and outside of work. This session introduces three components for confident communication: assertiveness, body language awareness, and two-way communication. Additional resources are included to help attendees identify their communication strengths and areas to build to become confident communicators.

### ***Additional Details***

Course Length: 1 hour

Mode of Instruction: Virtual

## **What Do You Want to Be Known For?**

### ***Overview***

In this lunch and learn, everyone will write what they want their legacy to be. They will learn how identifying your brand and what you want to be known for is the first step in enhancing your career and reputation. A thought-provoking conversation about reputation and how reputations are formed and managed will be conducted. Everyone will be prepared to write their own unique legacy statement.

### ***Additional Details***

Course Length: 1 hour

Mode of Instruction: Virtual

## **Work-Life Balance- What Does It Mean to You?**

### ***Overview***

“The key is not to prioritize what’s on your schedule, but to schedule your priorities.”

– Stephen Covey

In this lunch and learn participants will learn to write their own definition for work-life balance and what they are willing to do to commit to achieving more of it in their work and personal lives.

Two key questions will be explored:

- Am I spending my time in a meaningful way so that I honor my personal and work commitments in order to feel fulfilled?
- How can I become more active in creating work-life balance that is aligned with my goals?

### ***Additional Details***

Course Length: 1 hour

Mode of Instruction: Virtual

## **Hypnosis & Personal Development**

### ***Overview***

The subconscious mind is amazing and for centuries people have used hypnosis to bring about positive change and shift the mind into new directions. In this session, we'll discuss the history and uses of hypnosis and we'll dispel the myths around hypnosis and in particular give attention to the power of the mind. Participants will then go into a short hypnotic session that focuses on letting go of tension and deep relaxation ending with an easy technique for self-hypnosis.

### ***Additional Details:***

Course Length: 1 hour

Mode of Instruction: Virtual

## **Social Security Benefits**

### ***Overview***

Understanding social security-the rules around reduced and enhanced benefits and determining the best time to elect social security is a key component in retirement planning. We'll also discuss social security's history and its uncertain future, to better inform participants and guide their choices.

### ***Additional Details:***

Course Length: 1 hour

Mode of Instruction: Virtual

## **Estate Tax Planning**

### ***Overview***

For the next 2 ½ years, unless Congress intervenes, taxpayers have an unprecedented opportunity to reduce their taxable estate through annual giving and the uniform lifetime exemption. Proper use of beneficiary designations and TOD Deeds can also be used to reduce a taxable estate. Lastly, we'll touch on the use of insurance and trusts in effective estates tax planning.

### ***Additional Details:***

Course Length: 1 hour

Mode of Instruction: Virtual

## Estate Planning Checklist

### *Overview*

We'll discuss the various documents critical to comprehensive estate planning including wills, trusts and powers of attorney, and their uses. We'll also discuss guardianship and conservatorship, and how to protect and provide for loved ones.

### *Additional Details:*

Course Length: 1 hour

Mode of Instruction: Virtual

## Ways to Avoid Probate

### *Overview*

Probate is often a lengthy and expensive process. Avoiding it is a better option, when possible. The size of the estate and titling of assets are important determining factors in the state's determining the status and whether an estate must be Probate. We'll discuss titling options and the ramifications as well as other ways to reduce your estate and avoid probate.

### *Additional Details:*

Course Length: 1 hour

Mode of Instruction: Virtual

## Anatomy of a Simple Will

### *Overview*

Do you need a Last Will and Testament? We'll discuss the standard provisions in a simple Will and the reasons to use one in your estate planning.

### *Additional Details:*

Course Length: 1 hour

Mode of Instruction: Virtual

## Signs You Need a Financial Planner

### *Overview*

Financial planner or financial coach? Hiring a professional can help you set the path towards achieving your goals. For a more robust or complex portfolio, a planner might be the way to go. For less robust financial situations or when there is a heavy reliance on debt, hiring a coach might be the better option. We'll also discuss the various fees and costs.

### *Additional Details:*

Course Length: 1 hour  
Mode of Instruction: Virtual

## **Personal Financial Planning**

### ***Overview***

Do you know how to forecast your financial future? Become debt free so you can achieve your goals? Patience is the number one factor in long-term financial success. Learn how to help yourself in this program that kicks off the 30-Day Financial Clarity Challenge. Note: The Challenge introduces financial buckets and tasks for participants to complete over the 30 days.

### ***Additional Details:***

Course Length: 1 hour  
Mode of Instruction: Virtual

## **Wrap Up to the 30-Day Financial Clarity Challenge**

### ***Overview***

Let's share successes and questions! Designed for those who have completed the Challenge. Note: The Challenge introduces financial buckets and tasks for participants to complete over the 30 days.

### ***Additional Details:***

Course Length: 1 hour  
Mode of Instruction: Virtual

## **Understanding Medicare**

### ***Overview***

Although many know that Medicare eligibility begins at 65, there are two distinct enrollment windows that employees need to be aware of. Penalties for missing the correct enrollment windows are steep and lifelong. We'll also touch on primary and secondary payers and integration with FERS.

### ***Additional Details:***

Course Length: 1 hour  
Mode of Instruction: Virtual

## **Debt Repayment Strategies**

### ***Overview***



Personal debt is at an all-time high. Often, we don't realize how long it takes to get out from under debtor how excessive debt can affect everything from credit scores to employment to insurance. We'll discuss the two primary strategies for paying off and staying out of debt

***Additional Details:***

Course Length: 1 hour

Mode of Instruction: Virtual

## **Financial Readiness in Retirement**

***Overview***

For many of us, retirement might last 20 to 30 years. Learn the strategies to ensure both ample savings upon retirement and continuous cash flow throughout retirement. We'll discuss taxes and inflation and why these are critical for financial readiness in retirement.

***Additional Details:***

Course Length: 1 hour

Mode of Instruction: Virtual

## **Stress Management**

***Overview***

Schedules at work and home are becoming increasingly more demanding. We often find ourselves putting out on fire only to turn to another urgency-it's easy to overlook self-care. In this discussion, we take time out to focus on you and look at stress and how left unchecked can spill over into other areas of life such as well-being and relationships. Group members will share techniques they have used to manage their own stress. Then the facilitator will demonstrate with the group on the spot stress management techniques that work in many circumstances. Participants will have a .pdf as a takeaway with discussed tips

***Additional Details:***

Course Length: 1 hour

Mode of Instruction: Virtual

## 90-Minute Sessions

### **Communicate for Success**

#### ***Overview***

Many people think that effective communication is easy, but it is actually an advanced skill that can be developed and refined. In this course, participants will identify challenging communication situations they have had, and practice using different and new communication techniques to deal with them. A special emphasis is placed on communicating virtually.

#### ***Additional Details:***

Course Length: 90-minutes

Mode of Instruction: Virtual

### **Transitioning Into Retirement**

#### ***Overview***

Retirement can be a time of exhilaration or exhaustion. Embracing the future possibilities rather than holding on to the past is one of the keys of successful retirement. Part of being able to embrace the future is being prepared financially. With proper planning and a mindset that views retirement as the start of the next chapter, retirees report feeling better prepared financially, mentally, and emotionally. This session is an introduction to techniques and processes to become prepared for the biggest transition in our lives. Quick-paced and interactive, participants will learn a variety of techniques to help facilitate mental and emotional preparedness. Participants will be introduced to an easy-to-use worksheet template they can utilize to ensure all of their sources of retirement income and expenses are reflected together to make budgeting easier. An introduction to risk and risk tolerance, a topic critical to financial preparation, is also presented.

#### ***Additional Details:***

Course Length: 90-minutes

Mode of Instruction: Virtual

### **Managing Conflict Effectively**

#### ***Overview***

Participants will assess their own usual mode of responding to conflict situations. They will also learn that they can make different choices that can produce more favorable results. Instructor will offer proven strategies which neutralize some conflicts straight out or simplify complex conflicts into manageable ones. This is a highly interactive session with many round-robin discussions where participants will be invited to relate the principles presented to their own experiences.

#### ***Additional Details:***

Course Length: 90-minutes  
Mode of Instruction: Virtual

## **Managing Meeting and Facilitation Skills**

### ***Overview***

This workshop begins with participants completing an assessment that identifies practices that may be interfering with effective meetings. The course then provides information on practice in essential skills both leaders and participants need to ensure that all meetings are effective. These skills include: how to be a responsible meeting leader and participant, how to run and participate in a problem-solving meeting and how to facilitate productive discussions.

### ***Additional Details:***

Course Length: 90-minutes  
Mode of Instruction: Virtual

## **Managing Up**

### ***Overview***

The ability to Manage Up and across the organization is crucial to success. Take the time to manage yourself and your actions. Assess your environment. Consider your leader and what he or she needs from you. Embrace the mission and work to move initiatives and the leader's vision forward. Develop a positive relationship with your manager/supervisor. Understand your goals. Identify issues and challenges and work to move beyond them. DO your job well and when appropriate issues BEFORE they arise and then strategies for developing solutions for them.

### ***Additional Details:***

Course Length: 90-minutes  
Mode of Instruction: Virtual

## **2-Hour Sessions**

### **Mastering Public Speaking**

#### ***Overview***

Public speaking is a critical skill in today's professional world and mastering it can greatly enhance your ability to communicate effectively and influence others. In this 2-hour virtual training workshop, participants will learn the essential principles and techniques for delivering confident and compelling speeches, presentations, and pitches.

***Additional Details:***

Course Length: 2 hours

Mode of Instruction: Virtual

## **Navigating Your Career Path**

***Overview***

Managing your career is a lifelong journey that requires intentional planning and strategic decision-making. In this 2-hour virtual workshop, participants will gain valuable insights and practical tools to effectively navigate their career path, maximize their professional potential, and achieve their career goals.

***Additional Details:***

Course Length: 2 hours

Mode of Instruction: Virtual

## **Building Psychological Safety In the Workplace**

***Overview***

In today's fast-paced and competitive work environments, creating a culture of psychological safety is crucial for fostering innovation, collaboration, and high-performance teams. In this 2-hour virtual workshop, participants will explore the concept of psychological safety, understand its significance in the workplace, and learn practical strategies to build and maintain it within their teams and organizations.

***Additional Details:***

Course Length: 2 hours

Mode of Instruction: Virtual

## **Leadership Excellence**

***Overview***

While many organizations struggle to find leaders that have core interpersonal skills, still more have individuals in leadership roles who have difficulty working with peers, across matrix structures, and in sharing business vision with their stakeholders. At a fundamental level, all leaders have a need to be strong in planning, organizing, and decision making - but they must do this in conjunction with each other in order to be successful.

***Additional Details:***

Course Length: 2 hours

Mode of Instruction: Virtual