



POTE INITIATIVE SURVEY

FINANCIAL NEEDS AND OPPORTUNITY

[POTE Finance Initiative Subcommittee Survey](#)

THE POTE FINANCE INITIATIVE

- **WHO WE ARE:** We have experience, expertise, education and training in most aspects of personal finance, savings, investing, budgeting, debt management and taxation. We are black women with personal and professional experience. We are mothers, wives, sisters, friends, teachers, and above all we are grateful to serve Baha'u'llah.
- **OUR MISSION:** Through guidance from the Writings and our knowledge, and experience, we are helping people on their journey toward financial freedom by teaching them what they need to know in order to manage their own financial well-being. Our intention is to understand the financial needs and aspirations of the POTE, in order to gain insight on how to overcome our challenges as a community. Then, to use our expertise and resources to find ways to deliver financial education, so that an elevated understanding of how money works empowers our community for generation to come. One that changes the financial and economic trajectory of the POTE community.
- **WHY THIS INITIATIVE:** In assessing our goals, we realized the first place to start was sharing our hopes and intentions with the community we want to serve. As a part of that, we want to gather input and information through a survey and workshops like this, that will help us understand the greatest needs and concerns. Through a humble posture of learning, and using the survey process we can determine how to meet immediate and focus our energies on that. We will prayerfully ask for guidance to discover additional solutions that may emerge in this process.

FINANCIAL NEEDS AND ASPIRATIONS SURVEY

- For people who complete the survey and submit it by February 9th, 2021 will be invited to attend a complimentary financial workshop:
Part 2: Steps Toward Financial Freedom
- For those who attend Part 2, there will be an opportunity to receive a Personal Financial Assessment and Consultation session at no initial charge.
- If you know of a POTE, who did not attend tonight, feel free to share the survey.