Tutor
FINANCIAL ADVISORS

To: Alicia Ramsdell, Mindful Career Paths

From: Michael Lewis, Tutor Financial Advisors

Re: **Financial Wellness Workshops with Mindful Career Path Program**

Alicia:

I am pleased to be able to offer your clients and prospects the opportunity to deliver a series of Financial Wellness Workshops that can build knowledge and confidence in their employees as they manage their financial affairs.

The pandemic brought new awareness to financial wellness issues, as many employees are finding themselves uneducated or unprepared to manage their finances during a crisis.

Reports from benefitnews.com, the 2021 PwC Financial Wellness Survey and others all report similar storylines: Financial Wellness is a relevant and necessary topic within one's personal career development, as well as the topics offered through employer support programs.

Program Objectives

Provide an overview of Financial Wellness topics that educates beginners while providing thoughtful insights to those who may have already experienced major financial transactions.

Program Logistics

Each Workshop program runs 30-45 minutes including lecture and Q&A

Program Directory – The recommendation is to deliver the workshops over four consecutive weeks and covering four unique topics. Topic options include:

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Subject	Opening Workshop Question
The Psychology of Money	When it comes to money, what is your biggest source of anxiety?
Financial Risk Management	All investments can make money or lose money. How do you determine your tolerance for financial loss?
How to Ace Your Personal Credit Score	What metrics are used to compute your credit score?
Lifestyle Planning: Budget and Expense Management	Why is it so difficult to live within a budget?
Savings – You are never too young, or too old, to save money	What are the top three major expenditures you will likely face in your lifetime?
Investment Basics	How do I get rich quick? Reality: You don't
Retirement saving options	What do you like about your company's 401(K) plan?
Legacy Planning	What is the most important document to create before you die?

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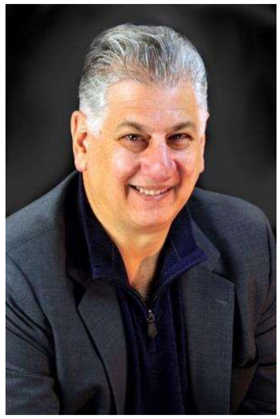

Michael Lewis CFA, MBA

Michael Lewis has an extensive financial services career. He is a Chartered Financial Analyst (CFA) and an expert on investment products, strategies and technology. He received his Master of Business Administration from Duke University.

His major career achievements include serving as a portfolio manager for a leading Canadian Investment Firm with ~$1 Billion in assets under management, managing multi-million-dollar budgets, and developing customized risk management solutions.

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