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