

Young Investor Worksite Education Project

Educator Workshop

March 30-31

Rutherford County Extension Office

Murfreesboro, Tennessee

March 30

11:30 AM Lunch

12:00 PM Overview of project

12:30 PM Making the case for employee education to employers

1:45 PM Break

1:45 PM Mobilizing and leveraging community support

3:00 PM Educational methods for use with young employees

4:00 PM Curricula and teaching resources

Dinner on your own



March 31

8:00 AM Review of Investor Education teaching concepts
Why Save
Starting Your Savings Program
Investment Options – Funds and Accounts
Investment Goals and Objectives

10:00 AM Brunch

10:30 AM Review of Investor Education teaching concepts
Selecting Appropriate Investment Strategies
Retirement Planning
Investment Fraud

Working with an Investment Professional

12:30 PM Adjourn

