

# Financial Capability Month

APRIL 2024



Boost your finances and prepare for the future with **FREE** virtual and in-person workshops on:

- Saving for retirement and estate planning
- Investing in stocks
- Avoiding scams and identity theft
- Managing cash flow and spending habits, and much more!

See website and back of flyer for dates and times.

### Get personalized help:

- One-on-one counseling on budgeting basics with Smart Money Coaching
  - \*Meet with a Certified Financial Planner™ to create a financial plan with Advisers Give Back
- \* Only certain income levels are eligible. See website for details.



REGISTER TODAY!



[on.sfpl.org/fcm24](https://on.sfpl.org/fcm24)

For questions about the program or help registering, contact [sfplcpp@sfpl.org](mailto:sfplcpp@sfpl.org).

For accommodations (such as ASL or language interpretation), call (415) 557-4400 or contact [accessibility@sfpl.org](mailto:accessibility@sfpl.org). Requesting at least 3 business days in advance will help ensure availability.

All SFPL locations are wheelchair accessible.

# Financial Capability Month

Jonathan Steimnitz  
Main Library – Business, Science and Technology Center  
May 16, 2024  
San Francisco Library Commission



# Financial Capability Month

## Events

15 Events Total

13 Virtual Programs

- 2 livestreamed at The Bridge

2 In-person Programs

1-on-1 Financial Help

## Attendance

2021: 1,660

2022: 385

2023: 810


**2024: 1,214**



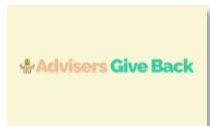
“I have been trying to get help with my finances this is the first time I have hope that someone can help me.”



# Programs and Partnerships

 <b>Work it</b> Presentation: The 7 Pillars to a Successful Retirement Plan	 <b>Work it</b> Presentation: Avoid Probate in California: Because at Least One Thing is Certain	 <b>Work it</b> Presentation: Behavioral Finance <small>How to Bring Your Best Instincts to Your Financial Plan</small>	 <b>Work it</b> Presentation: Demystifying the Financial Planning Process
 <b>Work it</b> Tutorial: Meet One-on-One with a CERTIFIED FINANCIAL PLANNER™	 <b>Work it</b> Presentation: Avoiding Scams, Fraud, and Identity Theft	 <b>Work it</b> Presentation: Get More Out of Your Cash Flow	 <b>Work it</b> Presentation: Everyone Retires— Things You Should Think About
 <b>Work it</b> Presentation: Financial First Aid	 <b>Work it</b> Presentation: Insurance: Know Your Sub-Limits	 <b>Work it</b> Presentation: The Psychology of Spending	 <b>Work it</b> Presentation: Introduction to Smart Investing
 <b>Work it</b> Tutorial: Meet One-on-One with a Smart Money Coach	 <b>Work it</b> Presentation: How to be a Sophisticated Consumer; Not a Myopic Consumer	 <b>Work it</b> Presentation: Why Invest in Stocks?	 <b>Workshop: Long Term Care Planning/Планирование Long Term Care</b>

- Navigating Financial Crises
- Financial Planning
- Money Management
- Investing
- Insurance
- Retirement
- Estate Planning
- Behavioral Finance
- Saving and Spending





# Patron Feedback



Smart Money Coaching at SFPL

“Thank you so much for making this hugely invaluable resource available to the community. Hope you all know how much it is appreciated, and the positive difference it has made!”

“It means a lot to me to get to learn during these workshops and speak 1:1 to bounce ideas and receive professional feedback, especially since I'm on my own and I have a senior dependent. Thank You!”

“I feel confident and hopeful that my situation will get better very soon! [My Smart Money Coach's] thoughtfulness, care, expertise and attentiveness makes a world of difference, as I navigate the complexities of managing my financial responsibilities.”

