

Tuesday, September 15, 2009

SBA to host a free financial planning clinic Sept 19

In today's uncertain economy planning for the financial future is more important than ever. Certified Financial Planner professionals will discuss financial management solutions and concerns at a free Financial Planning Clinic at 11 a.m. - 4 p.m. on Saturday, Sept. 19, at the Westin Southfield Detroit in Southfield Town Center.

The professionals will provide free advice and information on an individual basis. Volunteers at the clinic will meet with attendees one-on-one to offer advice on specific topics, such as retirement planning, investment strategies, estate planning, tax issues, insurance and employee benefits. Participants may come prepared with personal financial paperwork related or discuss general financial topics.

The clinic will also feature a series of educational workshop presentations addressing key financial planning topics, including: Managing Money in Hard Times: Dealing with Credit Cards, Foreclosure and Unemployment, Living Beyond Paycheck to Paycheck, Investment Planning for Retirement Assets and Managing Your Employee Benefits: From Pensions to Severance Packages.

Instructors and board members from the Oakland University School of Business Administration's financial planning program also will participate in the event as workshop speakers, counselors and assistants. Volunteer financial planners are not allowed to sell products and services or hand out business cards or marketing materials. Any attendee who wishes to follow-up with a volunteer professional will have access to the volunteer's name and contact information in the information package provided at registration.

The event is organized by Certified Financial Planner Board of Standards, a non-profit organization, whose mission is to benefit the public by granting the CFP® certification and upholding it as the recognized standard of excellence for personal financial planning, in partnership with the Center for Integrated Business Research and Education (CIBRE) at OU's School of Business Administration. .

To learn more or register for the Financial Planning Clinic, visit www.CFP.net. Walk-ins are welcome, but admission will be granted first to those who have registered online.

OU's financial planning program, developed more than 20 years ago, was one of the first in the country to be certified by the CFP Board of Standards. For more information, visit the Web site at sba.oakland.edu/ce and click on Financial Planning Certification Program.

SUMMARY

Certified Financial Planner professionals will discuss financial management solutions and concerns at a free Financial Planning Clinic on Saturday, Sept. 19.

Created by Katherine Land - Deleted (land@oakland.edu) on Tuesday, September 15, 2009
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