EViE FINANCIAL

240-403-2677 | hello@eviefinancial.com

Real-World Wealth Building Workshop

January 25, 2025 | 12:00 pm – 4:00 pm

9701 Apollo Drive, 1st Floor | Upper Marlboro MD

Life isn't one-size-fits-all... so why should your money moves be?

We'll offer interactive, hands-on learning, plus fresh perspectives and actionable strategies for everyday finances and long-term goals.

We'll also provide snacks, opportunities for Q&A, and plenty of stretch breaks, we promise! Keep reading to see what we'll cover in this free workshop — we look forward to seeing you there.

If you haven't registered yet, you can do so online or by sending us an email! We welcome guests, but please note that this is an adults-only event.

Questions? Let's chat:
240-403-2677 or hello@eviefinancial.com

Life & Wealth Planning

Personal Financial Strategies
Managing a Budget & Cash Flow
Understanding Income vs. Wealth Accumulation
Financial Planning for Lifestyle, Not Just Wealth

You'll learn how to identify and map your own personal financial approach, including the ins and outs of your own money and how to create realistic and actionable financial goals. We'll also discuss the difference between income and wealth, and how this difference can factor into your short- and long-term financial picture.

Barriers to Wealth Accumulation

Debt Mismanagement
Overlooking Tax Management
Misinformation & Miseducation

There's a lot of information (and misinformation) out there about managing your money. We aim to equip you with the tools and knowledge to make the decisions that are right for your own financial goals, and to sort fact from fiction when choosing the path that's best for you.

Wealth Accumulation Steps

Asset Allocation
Risk Management Strategies
Understanding Investments: Risk vs. Reward

In this section we'll guide you through the foundational knowledge needed to navigate different kinds of investments and understand the right strategy for you and your goals. We'll also discuss various important methods you can use to help protect your wealth via insurance, emergency funds, and portfolio diversification.

Vehicles for Wealth Accumulation

Retirement Accounts
Brokerage & Other Investment Accounts
Insurance as a Wealth Accumulation Tool

Next we'll review the various types of investment accounts, benefits and drawbacks associated with them, and which ones may be a good fit based on each individual's financial path. We'll also discuss life insurance and its role in protecting and transferring wealth, along with several other insurance types it's important to be familiar with.

Strategies for Implementation

Education & Analysis
Strategy Design & Review
Implementation

Everyone'e favorite part — we'll work through how to actually implement what you've learned to help propel you toward your goals! Knowledge is great, but what does it matter if you don't have the tools and understanding to use it?

We'll discuss ways to stay informed, how to use your knowledge to create a financial strategy tailored to your own specific needs, steps to take when implementing your personal financial plan, and some of the important details you'll need to know when selecting investments.

Managing Family Finances

Money in Real Life:
Practical Discussions
Raising Financially Aware Kids
College Funding vs. Retirement Planning
Parental Care & Financial Support
Estate Planning & Legacy Considerations

Financial wellness plays a huge role in the current and future health and happiness of your family. We'll talk about the importance of honest financial discussions with loved ones, as well as how to plan for your own legacy and the role you may play in your elders' financial futures.

Your Instructor:

Melissa Reaktenwalt MBA, CSRIC™, AIF®

Melissa founded EViE Financial Group on the premise of financial wellness and empowerment for all.

For each client we work with, our focus remains on actionable financial education combined with our firm values: Education, Vitality, Independence, and Empowerment.

Can't join us for the workshop, but still have questions? Reach out to us! We're happy to help.

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