MONEY COACHES CANADA

Taking the worry out of money

# MONEY TALKS

## Empower your Staff with Financial Literacy

Your team's concerns and unease around their personal finances impacts their performance at work and your organization.

Steve Bridge is an **advice-only** financial planner who delivers financial education that helps your people feel less stressed- so that they can focus on their work, not their finances.

**Contact Steve** 604-754-5911 steve@moneycoachescanada.ca moneycoachescanada.ca

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# WHY IT MATTERS

## Financial wellbeing is more important than ever.

The best employers understand that organizations work better when their people are healthy, happy and motivated. Physical and mental wellbeing is increasingly front-of-mind. But have you considered the impact that your people's financial health could be having on your business?

Finances are one of the biggest causes of stress for Canadians, and they're impacting your business too. Productivity, employee engagement, absenteeism, retention, even happiness - they're all negatively impacted by financial stress.

But **together**, we can change that.

Your people are your most valuable resource. I can work with you to deliver personal finance education that helps them feel less stressed, more secure and settled in their jobs.

Financially stressed employees are **4.9x** more likely to produce lower quality work.

**50%** of Canadians admit financial stress impacts their performance at work.

A cash-strapped employee is **5.8x** more likely to miss deadlines.

A survey by Ipsos Read Indicates that **78%** of Canadians want financial education in the workplace.

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# ABOUT STEVE

My job is to take the worry out of money. For the past decade, I've worked with clients to empower them to take control of their finances, giving them the tools they need to make a real difference to their lives.

Now I'm working with organizations just like yours to make financial education a key part of your employee wellness strategy.

There's **no sales**, **no jargon** - just honest, unbiased and engaging advice from a qualified professional. I'll give your employees the advice they need to build a financially secure future.

CAPS

Canadian Association of Professional Speakers
Association Canadienne Des Conférenciers Professionnels

## WATCH STEVE IN ACTION!

*Financial Wellness Talks for Your Team with Steve Bridge, CFP®*

*A Testimony of Steve Bridge by Haleigh Leger of MNP Canada*

## Practical Advice

I deliver actionable advice and practical strategies that make a real difference to your employees.

## Wellbeing That Works

Your people will be more engaged, more productive and less likely to succumb to financial stress.

## Engaging Presentations

My passion for financial education makes a stressful subject engaging, relevant and empowering.

## No Hard Sell

I'm an advice-only planner. That means no sales, no commissions - just honest advice your people can trust.

## Tangible Benefits

Every presentation includes invaluable resources for your employees to take away.

**"I give your employees the advice they need to build a financially secure future."**

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# PRESENTATION OPTIONS

Pick one of Steve's popular half-day options below, design your own bespoke presentation, or create a **Money Masterclass** Series for your team.

## EXCELLING AT MONEY FUNDAMENTALS

- Master successful money management keys
- Understand the link between goals and finances
- Gain clarity on income, expenses, and create a practical budgeting system

## GETTING READY FOR RETIREMENT

- Know how much you'll need to retire and where your money will come from
- Understand how your pension fits into your plan
- Gain an understanding of CPP and OAS and considerations of when to start them

## LET'S TALK ABOUT TAX

- Optimize the use of RRSPs and TFSAs to lower taxes
- Learn why the right RESPs rock and explore the new First Home Savings Account (FHSA)
- Gain insight to how our tax system works

## INVESTING MADE EASY

- Learn the four keys to becoming a great investor
- Understand the significance of fees in investment decisions
- Overcome the biggest obstacle to achieving success in investing

CLICK HERE TO SEE A COMPREHENSIVE LIST OF TOPICS!

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# WORKING WITH STEVE

## RECENT CLIENTS

## IN THE MEDIA

CLIENT
## TESTIMONIALS

*"Steve Bridge's presentation at MNP on Financial Wellness was terrific! I was appreciative of the informative and useful content he presented. He's an excellent speaker; he was engaging with the audience, combining humour and knowledge to provide useful takeaways to implement in my day-to-day. I left his presentation feeling informed and motivated to stay on top of my financial wellness plan."*

**RACHEL R, MNP**

*"Steve conducted our inaugural virtual financial wellness session to accommodate our members spread across the province. The three-hour session kept the attendees engaged, and the pace was just right, allowing everyone to participate in discussions and ask questions...I received positive feedback from many participants who found the session informative and worthwhile."*

**MARGARET B, ALBERTA MUNICIPALITIES**

*"Certainly feel free to reference how well this presentation went over with our staff. I think it may still hold the highest attendance record for a single training session, and was talked about the other week by an employee who attended. My staff have mentioned how valuable it was to receive this type of training from their employer."*

**JESSICA B, CITY OF FORT ST. JOHN**

*"Thank you for the morning and afternoon presentations you hosted in Lacombe last week. Everyone I have spoken to after the sessions has nothing but good to say about the content and the presenter!"*

**PHILIP B, CITY OF LACOMBE**

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# IT'S YOUR TURN

Create a bespoke presentation or a series of presentations from the topics below that work for you and your team.

## HOW IT WORKS:

1. The first **10 minutes** of each presentation will begin with *why* money matters and how it impacts our lives.
2. Next, you can choose a topic (or multiple) from the list below that best benefits your team's needs.
3. Finally, each session ends with a **15-30 minute** Q&A.

| TOPIC | DURATION |
|---|---|
| Calculating and Tracking Net Worth | 10-15 MIN |
| Mastering Cash Flow | 10-15 MIN |
| Escaping the Lifestyle Inflation Trap | 10-25 MIN |
| Building a Robust Money Management System | 30-45 MIN |
| Exploring Smart Savings Hacks | 15 MIN |
| Building a Strong Emergency Fund | 10 MIN |
| Unravelling the Mysteries of Credit Scores and Reports | 10 MIN |
| Navigating Car Loans and Financing | 20-25 MIN |
| Simple vs. Compound Interest: Making Money Work for You | 15 MIN |
| Securing You & Your Family with Life and Disability Insurance | 20 MIN |
| Making Informed Decisions About Mortgages and Housing | 20-30 MIN |
| Protecting Against Scams and Fraud | 10-15 MIN |
| Demystifying Taxes: What You Need to Know | 20 MIN |
| Minimizing Taxes With RRSPs, TFSAs, and FHSAs | 60-75 MIN |
| RESP Essentials | 20 MIN |
| Managing Your 'My CRA Account' Like a Pro | 10 MIN |
| Preparing for a Comfortable Retirement | 45-50 MIN |
| Understanding Drawdown in Retirement | 50-60 MIN |
| CPP and OAS Benefits Explained | 30 MIN |
| Navigating Your Pension Plan | 20-30 MIN |
| The Essential Guide to Investing | 60 MIN |
| Estate Planning: Wills and More | 20 MIN |

Connect with Steve for suggestions or what has worked for others.

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