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BUILDING YOUR FINANCIAL CONFIDENCE

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MEMBER FDIC
EQUAL HOUSING LENDER
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BUILDING YOUR FINANCIAL CONFIDENCE

[Add your name and title here]

40 Minutes

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AGENDA

Today we will focus on these big questions . . .

1. What stresses you out and what motivates you about finances? Face your money fears.

2. What can you do to take charge of your finances instead of letting your finances take charge of you? Get educated.

3. How can you best prepare yourself and be fully confident about your finances?

Take charge of your financial future.

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take
control

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Why do you think it is so hard for people to manage their everyday finances?

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What are some things you have seen friends and family experience as a result of ineffective money management?

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- Pay off credit card debt
- Start a savings plan
- Set aside cash for emergency funds
- Acquire life and disability insurance

Set Financial Goals

Short-Term Goals

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Set Financial Goals

Medium-Term Goals

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Set Financial Goals

Long-Term Goals

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savings

tools

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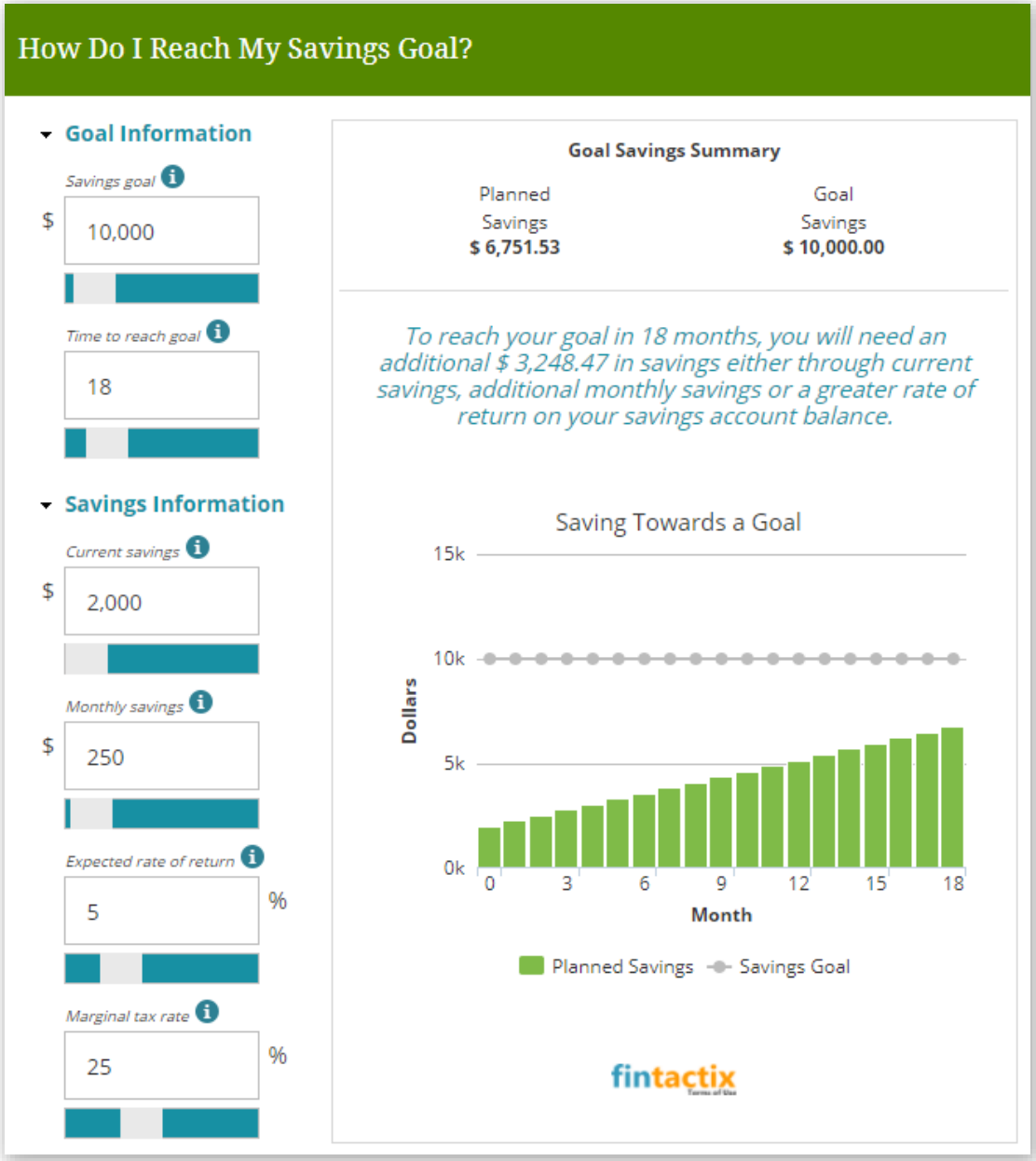
What Will It Take to Reach My Savings Goal?

regions.com/calculators



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saving for a big purchase

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lower loan balances

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get ahead on your taxes

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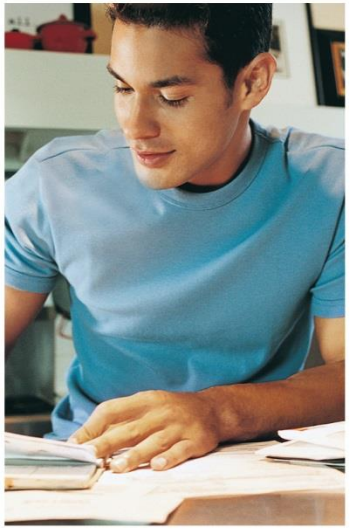

simplify and organize

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focus on small, sustainable steps

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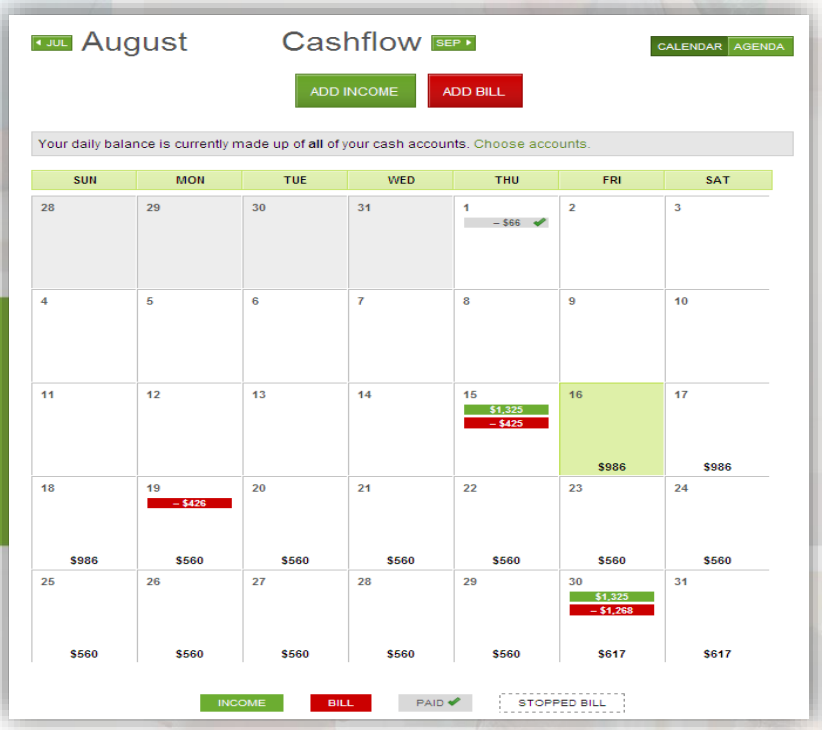
make the most of your income



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Move Beyond a Budget to Create a Financial Strategy

- Short Term
- Medium Term
- Long Term

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action

plan

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CONGRATULATIONS

Today, you will leave with ideas to:

- Face your money fears.
- Get educated.
- Take charge of your financial future.

Thank you.

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Learn More About Meeting Your Financial Goals

1

Make an appointment with a Regions banker:

- Call the Regions Green Line at 1-800-REGIONS
- Go to regions.com and click "Make an Appointment"
- Visit any Regions branch

2

Visit the Regions Financial Learning Center for free, online interactive videos: Regions.com/learn

3

Use our online resources including articles, videos, and calculators:

Regions.com/insights

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