



Lead With Purpose Foundation

March 13 Financial Workshop

LOCATION

Thousand Oaks Teen Center
1375 E Janss Rd., Thousand Oaks, CA 91362

AGENDA

1:00 – 1:30 pm = Middle School Team Meeting

1:30 – 3:00 pm = Better Money Habits for middle and high school students
(Parents are welcome.)

Presenters from Merrill Lynch, a Bank of America Company

Henry Hosung Byun, CFP (Certified Financial Planner), Wealth Management Advisor
Manny Salcedo, Wealth Management Banking Specialist

Better Money Habits® is a financial education program from Bank of America that easily and effectively teaches members of our communities how to build financial know-how so that people can make confident personal financial decisions. Through our partnership with Khan Academy, a leader in online learning, we've created a simple way to get real, practical knowledge about money

Students will learn the basics of banking, tips for managing money including balancing wants and needs, understanding the role of credit, and the importance of protecting financial information.

3:00 – 4:00 pm = Happy Hour

Light refreshments are served.

4:00 – 4:30 pm Clean up