

Financial Confidence Workshop

Spring 2017

Instructors:

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Course Description:

Personal finance is important, but it can be a challenge to sort through the different “advice” that is available. Additionally, many family members and friends may not know how or may prefer to keep their own financial choices private. This workshop series is to help students sort through all of the information, simplify their own finances, and feel prepared to make financial decisions that they can maintain throughout their lives as students and in their professional lives after graduation. Due to the generous grant from the Penny Pilgram George Women’s Leadership Initiative, this program is provided for women, by women so that we all can be confident in our own financial future no matter the options that are available.

Course Objectives:

- Learn how to manage, adapt, and keep a budget and savings
- Set short and long term financial goals
- Develop familiarity with financial management resources and financial jargon
- Implement financial tools to achieve financial goals
- Prepare for future choices in investing in retirement, savings, and other financial decisions impacted by a credit score, as well as, protect oneself from identity theft
- Prepare for short term goals such as studying abroad and building a professional wardrobe
- Students leave confident to manage their own finances and inform women that they can do the same

Course Expectations:

Everyone works together to create a safe space to ask questions. This is a space that we will all learn!

Do your best to manage a budget. It can take a month or two to make it a natural habit. Don’t give up!

Complete all homework assignments as assigned.

Notify us if you ever have any questions or concerns. We are here to help!

Weekly Course Outline:

January 27, 2017: Your Spending Plan

Prepare: Track your expenses beginning January 2nd. Bring tracker along with access to banking account/banking statements to class.

Homework for Next Class:

Finish creating your budget that we started this session. Begin to utilize throughout from this point on (we will evaluate how things are going in 2 weeks).

View video clip and article (links will be sent by email on Monday, January 30th) that will aid in our discussion next week.

February 3, 2017: Money Habitudes

Homework for Next Class:

Keep monitoring your budget.

Create your financial goals.

February 10, 2017: Managing Your Budget and Preparing for the Future (Steps to Success)

Homework for Next Class:

Keep monitoring your budget.

Pull a copy of your credit report (step by step instructions will be provided)

February 17, 2017: Credit, Banking, and Identity Theft

Homework for Next Class:

Keep monitoring your budget

Set up a password vault and make unique passwords for at least 5 sites that contain your financial info.

Review the saving and identity theft options through your bank

Find the interest rate of your credit card

February 24, 2017: Saving and Investing

Homework for Next Class:

Keep monitoring your budget

Bookmark 1 or 2 Duke In/Duke Approved study abroad programs (and Duke Engage if you wish) you are interested in attending.

View the Study Away section on <https://financialaid.duke.edu/>. Write down any questions you have for planning to study abroad.

March 3, 2017: Managing Your Expenses While Studying/Serving Abroad

Guest Speaker: Susan Pratt, Assistant Director, Global Education Office at Duke

Homework for Next Class:

Keep monitoring your budget

Research the appropriate business attire for the industry you hope to work in

Write down elements that are important to you for your own style

Break on Friday, March 10 and 17 due to Spring Break

March 24, 2017: Dress for Success on a Budget

Guest Speakers: Jackie Alford and Janice Coleman, Karsh Office of Financial Support

Homework for Next Class:

Keep monitoring your budget

Write down items you will need in order to build a 2 day interview outfit and 2 professional networking outfits.

Get in the habit of saving and monitoring sales/shopping consignment.

April 7, 2017: Paying for Graduate School and Applying for Fellowships

Guest Speakers from Duke Graduate School