

## What is PlanWell<sup>TM</sup>?

PlanWell<sup>TM</sup> is a financial education curriculum designed to help human resources departments bring financial well-being to their workplace. It provides a one-on-one, personalized employee financial experience through customized workshops, classes, webinars, and professional guidance.



## Workshops For Business Owners

### Actionable Ideas for Business Owners

This session offers actionable ideas and tips for business owners. The presentation will provide you with guidance in three major categories: Leading your business, Growing your business, and Inspiring your team.

### Understanding the Value of Your Business

Are you a business owner looking into next steps for your company? This workshop will help you learn more about the critical role of valuation. You will understand different approaches to valuing a business, common roadblocks and motivators, and why it's important to know the value of your hard work.

### Employee Financial Wellness Strategy

Are you a business owner who wants to develop a strategy for employee financial wellness? This seminar covers the basics of how to build your offering. Learn more about concrete steps you can take to implement a comprehensive employee financial wellness strategy to help make your workplace the best it can be.

## Workshops For Your Employees

### Creating a Budget

Having a budget is the foundation of your financial well-being, and the basis of all your long term financial plans. This presentation covers all aspects of budgeting including: budgeting overviews and information, and steps you need to take to create an accurate, flexible monthly budget.

### Financial Goal Setting

Setting and understanding financial goals is essential to building the foundation for your financial well-being. This presentation covers: the importance of setting financial goals, how to make your goals SMART: Specific, Measurable, Actionable, Relevant, and Timebound, and suggested goals that address top employee concerns including Income, Savings, Retirement, and Debt.

### Money Talks - Finance 101

Becoming truly financially independent is the first step in achieving long term financial success. How you get there make take time. This session will help you understand what being financially independent means, identify tasks to do in your 20s, and targets to shoot for in your 30s, and avoid financial pitfalls along the way.

### Taking Control of Debt

Managing debt while meeting other financial priorities can be tricky. This presentation covers exactly what you should know to take control of your debt and get back on track to maintain financial stability. Topics include a general overview to help understand your debt, classify your debt, steps to create and implement a payment plan, and how to balance debt with other financial goals.

## About Simon Leonard, *Financial Advisor*



Simon started his career working in Investments Banking at UBS, RBS & HSBC in London and New York. After 15 years followed his dreams to be a brewer. Initially starting out as a consultant brewer, he purchased Fire Island Beer in 2014. At the time the company was contract brewing and selling through local distributor in NY.

After creating a group of investor's Fire Island built its own facility in Bayshore NY. The following 4 years he experienced the success, failures, and pitfalls of owning a small business that is a brewery.

In 2018 Simon and young family decided to move back to Boston to be closer to his wife's family. Simon relinquished the day-to-day management of the business to colleagues. Unfortunately, they were unable to keep the distribution arrangement and subsequently shuttered.

Simon is now calling on this vast experience in both the Investment and Small Business world to help other individuals and business owners ensure they are in the right position for success at home as well in business.

**Simon will be hosting future webinars to help educate on key pain points and potential solutions for business owners. He will, also be joining the quarterly in person meetings so feel free to ask him questions!**

Simon holds a BSc in Biochemistry from the University of Birmingham (UK) and completed the Siebel Institute of Technology, WBA Concise course in Brewing Technology.

**SCHEDULE WORKSHOP HERE**