End of Summer Symposium

Thursday, July 18, 2019
“Getting to the Core of Financial Capability”

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Getting to the Core of Financial Capability

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Introduction To Research

**Bold Statement**
One’s financial capability is influenced by their set of core values.

**Topic**
Philosophies, guiding principles, and core values as key drivers of individual and household financial capability.
Ancient Philosophy

- Stoicism Inspiration
- Christianity's Effect
- Zen Mentality
Important Figures

❖ Benjamin Franklin
❖ Warren Buffet
❖ Billie Holiday
Technology’s Emphasis on People’s Money Personality and Self-Discipline

❖ How it influences your core values?
❖ How it influences your money?
❖ How it reflects your habits?
❖ Why is it important?
Core Values

❖ What are core values?
❖ Common core values
❖ Influences
❖ Influence on finance
Emotional Money and Survivalist Mentality

- What is emotional money?
- How it impact your finances?
- How to improve it?
- What is survivalist Mentality?
- How it impacts your finances?
Windfall

❖ What does windfall mean?
❖ How are the receivers affected?
❖ How to benefit from it?
Proposed Solutions

❖ Find someone relatable to teach
❖ Financial Circus/Flash Mob
❖ Advertising and Media
Summary

❖ What influences your core values?
❖ How it affect your finances
❖ Ways to improve spending habits
❖ Importance of financial education