



FINANCIAL HEALTH FOR FAMILIES WORKSHOP OVERVIEW

Workshop Description

Managing finances for one can be daunting. Add two or more adults and children and it can feel an insurmountable challenge. Participants take a closer look at the extended family unit and the issues that come with managing a household. They will use the program's key skills and tools to address the financial challenges unique to families with children.

Key Workshop Goals

- Introduce key concepts of family financial planning
- Understand the implication for family households
- Identify the financial considerations unique to families
- Discuss issues around stability, protection and security of family members and assets.

Core Skills Covered

- Applying program core skills (Goal Setting, Budgeting) to the family unit.
- Preparing for ongoing and long term goals for the family and its members

Handouts To Be Discussed

- Financial Resources for Families Handout
- Estate Planning Assets Checklist

Follow-up Exercise: Participants will Create a family budget using [Economic Policy Institute \(EPI\)'s Family Budget Calculator](#) and review Estate planning checklist and core Estate Planning documentation to identify what applies to your household