

Day 1 Curriculum

Session 1: Introduction		3/14/15, 10:00 – 10:30
Objective	Activity	Resources
<ul style="list-style-type: none"> Consider your own financial experiences. Reframe your perception of finance. 	<ul style="list-style-type: none"> Financial Quiz Personal Action Items 	<ul style="list-style-type: none"> “Don’t! The Secret of Self Control” “Many Parents Failing to Educate Children About Money.”
Session 2: Goal-setting		3/14/15, 10:30 – 12:00
Objective	Activity	Resources
<ul style="list-style-type: none"> Develop a process for articulating, quantifying, and achieving goals within the context of financial planning. Weigh the potential costs and benefits of key decisions through a financial goal-setting prism. Define utils. 	<ul style="list-style-type: none"> 30 Circles Hypothetical Goals Cost/benefit Analysis 	<ul style="list-style-type: none"> “Ten Habits of Successful Artists” “Don’t Indulge; Be Happy.” Goal worksheets
Session 3: Budgeting for Goals		3/14/15, 1:00 – 2:30
Objective	Activity	Resources
<ul style="list-style-type: none"> Understand budgeting as a forward-looking tool, not simply a historical tracking device. Build a util-maximizing budget. Identify areas of weakness in a budget and use that knowledge to plan for contingencies. 	<ul style="list-style-type: none"> Let’s Pretend Sensitivity Analysis Variance Activity 	<ul style="list-style-type: none"> Budgeting templates Analysis tools
Session 4: Cash Budgeting		3/14/15, 2:30 – 3:00
Objective	Activity	Resources
<ul style="list-style-type: none"> Ascertain the minimum amount of reserve needed to deal with shortages. Recognize the intersection of portfolio careers (especially supporting roles) with income and goals. 	<ul style="list-style-type: none"> Budget Flip Portfolio Career Map 	<ul style="list-style-type: none"> “Why Budgeting is Like a Diet: Ineffective” Cash template Portfolio map
Session 5: Personal Financial Statements		3/14/15, 3:00 – 4:00
Objective	Activity	Resources
<ul style="list-style-type: none"> Prepare a personal balance sheet and income statement. Understand how financial statements relate to budgeting, taxes, and goals. 	<ul style="list-style-type: none"> Build Financial Statements (homework) 	<ul style="list-style-type: none"> “Beginner’s Guide to Financial Statements” Financial statement templates Connection graphic
Day 1 Wrap-Up		3/14/15, 4:00 – 4:30
Objective	Activity	Resources
<ul style="list-style-type: none"> Connect personal goals with financial data. Identify personal utils and goals. 	<ul style="list-style-type: none"> Visualization Exercise Personal Goals (homework) 	<ul style="list-style-type: none"> Visualization podcast Goal worksheets

Day 2 Curriculum

Session 6: Record-keeping		3/15/15, 10:00 – 11:00
Objective	Activity	Resources
<ul style="list-style-type: none"> Evaluate the key pieces of evidence any good recordkeeping system retains and presents. Develop habits for tracking financial data. 	<ul style="list-style-type: none"> Research Activity 	<ul style="list-style-type: none"> Mint.com Quick Books/Quicken GYST
Session 7: Taxes, Insurance & Nonprofits		3/15/15, 11:00 – 2:30
Objective	Activity	Resources
<ul style="list-style-type: none"> Review the types of taxes a self-employed artist likely must pay. Summarize key deductions common for creative entrepreneurs. Review healthcare options under the Affordable Care Act. Describe other forms of protection available. Articulate the pros and cons for various business entity types from liability, cost, and tax perspectives. Discuss funding strategies. 	<ul style="list-style-type: none"> Tax Overview Healthcare Overview Insurance Resources Entity Overview 	<ul style="list-style-type: none"> IRS Publication 583 New York State Exchange Fractured Atlas one-sheet SBA summaries NEA: “How the U.S. Funds the Arts” NEA: “A Decade of Arts Engagement”
Session 8: Investment Overview		3/15/15, 2:30 – 3:30
Objective	Activity	Resources
<ul style="list-style-type: none"> Gain comfort around basic investment options and vocabulary. 	<ul style="list-style-type: none"> Cost/benefit and Risk/reward Investment “Rules” 	<ul style="list-style-type: none"> “David Swenson’s Guide to Sleeping Soundly”
Day 2 Wrap-Up		3/15/15, 3:30 – 4:30
Objective	Activity	Resources
<ul style="list-style-type: none"> Reconnect the pieces covered during the workshop. Summarize content and action items. 	<ul style="list-style-type: none"> Now What? 	<ul style="list-style-type: none"> Calendar checklist Next Steps