Building a Financial Plan for School and the Future

For over 30 years, this financial planning seminar series has been offered to Thomas Jefferson University students and hospital residents.

"Building a Financial Plan for School and the Future" is designed to provide important information to all current TJU students and JHS housestaff who face decisions concerning repayment of their educational debt; developing a workable financial plan, including an insurance program; getting the most out of their income; and legal considerations of employment contracts. Seminar speakers are experts on their respective topics and will address individual questions in the question and answer session which follows.

2018 Seminar Series Schedule

When:
All sessions begin promptly at the time indicated. Refreshments will be served 15 minutes prior.

Where:
Check each session for specific location information.
If you have any questions, please contact the TJU Center City Financial Aid Office at (215) 955-2867 or financial.aid@jefferson.edu

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First session - **What Everyone Should Know about Personal and Professional Financial Planning**
Timothy Valente, Senior Vice President, Financial Advisor, RBC Wealth Management
Tuesday, March 20 6:15pm to 7:30pm
Bluemle Life Sciences Building (BLSB) Room 101

Second session - **What You Should Know about Mortgages & First Time Home Buying**
Joan Kofsky, Sr. Loan Officer, Gateway Funding
Kelly Steyn, Keller Williams Realty
Tuesday, March 27 12:00 Noon to 1:00pm
Eakins Lounge Jefferson Alumni Hall (JAH)

Third session - **Managing Educational Debt**
Susan McFadden, Executive Director of Financial Aid, Thomas Jefferson University
Thursday, March 29 6:15pm to 7:30pm
Bluemle Life Sciences Building (BLSB) Room 101

Fourth session - **What You Should Know about Insurance**
Richard D. Scott, CLU, Insurance Planning Group, Inc.
Mindi Vogel, Benefits Advisor, The Megro Benefits Company
Thursday, April 5 12:00 Noon to 1:00pm
Eakins Lounge Jefferson Alumni Hall (JAH)

Fifth session - **Taking Control of Credit- Building a Foundation**
David Wheeler, Credit Plus, Inc.
Tuesday, April 17 12:00 Noon to 1:00pm
Eakins Lounge Jefferson Alumni Hall (JAH)

Sixth session - **DIY: Personal Budgeting**
Susan McFadden, Executive Director of Financial Aid, Thomas Jefferson University
Momo Nakagawa, Research Data Analyst, Office of Institutional Research, Thomas Jefferson University
Monday, April 23 12:00 Noon to 1:00pm
Eakins Lounge Jefferson Alumni Hall (JAH)

Seventh session - **Practical and Legal Consideration of Planning Your Professional Future**
Joseph R. Pozzuolo, Esq., Pozzuolo Rodden, P. C.
Monday, April 30 12:00 Noon to 1:00pm
Eakins Lounge Jefferson Alumni Hall (JAH)

Speaker Information

Joan Kofsky - Joan is the Location Manager at the Wayne PA branch of Finance of America Mortgage. She has been in the banking industry for more than 30 years. Joan will discuss information on acquiring a mortgage considering the current turmoil in the mortgage industry.

Susan McFadden - Susan is currently the Executive Director of Financial Aid at Thomas Jefferson University. Susan has worked for Jefferson for over 30 years. Susan's presentation will provide sound information, strategies and examples about managing the increasing educational debt that students and graduates are facing today and tips for effective personal Budgeting.

Momo Nakagawa - Momo is a Research Analyst in the Office of Institutional Research at Thomas Jefferson University. Momo's presentation will focus on financial budgeting methods she has explored and adopted as a recent graduate.

Joseph Pozzuolo, Esq. - Joe is from the law firm of Pozzuolo Rodden, P.C., located in Philadelphia. Mr. Pozzuolo discusses a presenter since the inception of this Seminar Series 30 years ago, discusses the importance of contract specificity and issues that graduates should consider when starting a practice or entering into business with an associate or group of associates.

Richard D. Scott - Richard is from the Insurance Planning Group, Inc. in Rosemont, Pa. Rich has more than 30 years of experience in the insurance industry. Rich will provide free and sound advice about the importance of insurance and the fundamentals.

Kelly Steyn - Kelly is a Realtor with Keller Williams Realty. She specializes in assisting First Time home buyers. Her presentation will speak to this population and what is important to consider.

Timothy Valente - Tim is from the Valente Investment Group of RBC Wealth Management in Philadelphia. Tim has been in the financial services industry since 1988. Tim's discussion will focus on the retirement investment options available now and for the future as well as the importance of starting a retirement plan early in conjunction with playing off student loans.

Mindi Vogel - Mindi is a Benefits Advisor with The Megro Benefits Company where she specializes in building competitive benefit plans for emerging companies and university student groups. She is a licensed Health and Life Agent and Self – Funding Certified. Mindi will speak to the current Affordable Care Act and how to understand the complexities.

David Wheeler- David is a Regional Account Executive for Credit Plus, Inc. In the last decade of being a credit trainer and developer, Dave has been recognized as one of the country's leading credit scoring experts. Through his relationships with Fair Issac and CreditXpert, he has developed scoring models, designed MBA and Realtor courses, written case studies for congressional testimony, and brings focused attention to risk assessment for lending institutions. Much of his work today centers around bringing best education and practical application to the market.