

Savings Success

This interactive presentation allows attendees to identify financial goals, discuss strategies to reduce expenses, plan for next steps, plan for setbacks, and set reminders for upcoming steps. Savings Success was designed with a focus on behavioral economics tools that promote behavioral change.



Workshop Presentation Deck

A slide-by-slide walk through an interactive workshop, with comprehensive talking points



Savings Plan Worksheet

A step-by-step worksheet for finding key ways to reduce expenses and commit to savings

The Savings Success and Credit Voyage materials use a core set of proven plan making tools that promote behavior change.



The materials help clients make a plan and encourage them to take action.

Credit Voyage

This interactive presentation guides participants through a personalized action plan where participants identify goals, review financial impacts of credit, analyze and choose strategies to maintain, improve, or establish credit, and plan for next steps to take.



Workshop Presentation Deck

A slide-by-slide walk through of an interactive workshop, with comprehensive talking points.



Credit Voyage Map

A visual representation of the clients' journey to financial health that acts as a checklist in the session and a plan for after the session.



Credit Voyage Guidebook

A document that provides strategies, next steps and prompts to help clients build a personalized plan to use in the session and at home.