Financial Courses

January through December 2023

Learn more at www.finpathwellness.com/courses

3 Personal Finance Rules to Know

January 2023

Taking control of your money starts by having a good understanding of basic concepts including budgeting, spending, and savings habits. This course is great for anyone who has future goals for their money but is struggling to make progress.

Tips to File Your Taxes Like a Pro

February 2023

Filing your annual income taxes can often be confusing or complicated. In this course, we provide key tips on how people can maximize their refund and reduce the amount owed, and provide ways to make filing taxes a smooth experience.

Understanding Retirement Readiness

March 2023

Retirement is a common goal for the majority of Americans. The ability to achieve financial independence takes discipline and strategy over the course of your working life. In this course learn and understand the varying stages to prepare you for retirement.

Inflation, Interest Rates, and Your Money

April 2023

2022 was a year of inflation and increased interest rates. This adversely impacted people and their bank accounts nationwide, causing risky financial outcomes for thousands. Join this course to see how inflation and high interest rates can be tackled in 2023.

Getting to Know Cryptocurrency

May 2023

Cryptocurrency is becoming an integral part of monetary exchange to date. While this kind of currency is based within digital technology, cryptocurrency is slowly becoming a popular form of banking and investment alternative. Get to know cryptocurrency a little bit more in this course!

Buying a Car: Know Before You Go!

June 2023

The decision to purchase a car can be one of the most exciting times in someone's life. This course walks you through the buying process and pays particular attention to the car-buying process.

Questions You Should Ask Your Financial Advisor

July 2023

If you already have a financial advisor or you're meeting one for the first time, it's important to be prepared. Before you meet with a financial advisor, you want to make sure you're hiring the best person for you and your situation. In this course, we highlight the best questions to ask your financial advisor.

Get Insured: Protect Your Income and Assets

August 2023

Financial security is vital to every person and their finances. It's important to have a plan in place to protect your income and personal assets. This course will take a deep dive into how insurance can maintain your financial security and enhance your overall financial wellbeing.

Crash Course: Credit and Managing Debt

September 2023

According to financial experts, the percentage of Americans in debt is around 80%. This course will examine the impact credit has on finances and how people can manage their credit with good management practices.

Estate Planning Basics for Everyone

October 2023

Estate planning is an important part of financial planning for 99% of Americans. Many people think estate planning is just for those who are super wealthy, but that just not true. Our Financial Coaches will help you understand why everyone needs a will and a plan in place just in case they expectedly pass away or become incapacitated.

How Am I Invested in My Retirement Account?

November 2023

Most jobs in the U.S. come with a retirement account. But how exactly do these accounts work? Join this course to discover how exactly investments work in retirement accounts.

Debt Collection: Know Your Rights

December 2023

Debt collection issues can be challenging and can caused significant financial stress. You don't have to face them alone. In this course, understand how debt collection works and discover your rights.

Ready to learn?

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