

GET READY FINANCIAL PREPAREDNESS EMPLOYER CHECKLIST

Use this checklist to help start your Get Ready Financial Preparedness Club for your employees.

You want to be financially prepared for anything that comes your way. So do your employees. I can help you and your financial preparedness club stay on top of those financial to-do's and reduce the financial anxiety. Let's Get Ready!



Financial Preparedness Club

GET READY: LET'S BUILD YOUR CLUB

- Find a Meeting Place
- Invite Your Employees.

Helpful Hints:

- Consider a face-to-face club and/or incorporate on-line, real-time participation for those who can't attend in person, such as your off-site employees.
- Keep your club to a maximum of 15 members

GET READY: DEVELOP YOUR CLUB STRUCTURE

- Ask if they will be willing to contribute to conversations.
- Are they committed to being organized?
- Club leadership. Who will manage the club?
- Agree on club rules. Examples:
 - Respect for other members.
 - How to add or remove members.
 - Allow all members to speak.
 - Encourage one another.
- Decide on Communications: Email, Text, Shared Google Drive, etc.
- Decide on Meeting Time and Place. Clubs are encouraged to meet once/month.
- Discuss Logistics: i.e.: Rotating monthly lead, food, etc.)

GET READY: YOUR CLUB OBJECTIVES

- Decide on Goals and Timeframe for Achieving Goals
- Be sure to follow the discussion format utilizing the Get Ready Summary (emailed to the Club Leader each month).

GET READY BIG!

- Place a bulk order for Get Ready and receive a club discount (contact Tony for details – tony@tonysteu.com).
- Schedule your club with a one-on-one consult with Tony via Zoom or Skype.

Have Fun!

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