

Money Made New Seminar Series For Organizations

Synopsis

- **Objective – What outcome awaits those who attend this Series?**

Align their current relationship with money and personal finance with life goals that are uniquely authentic for each attendee.

*There is only one life you can call your own
and a thousand others
you can call by any name you want...*
'All The True Vows' – David Whyte

- Identify our cultural paradigm –‘more money will make you happy’.
 - Expose the fallacies of our own internalized “money messages”.
 - Propose a new paradigm for money and personal financial management.
 - Make this new money paradigm real with day- to- day personal finance application.
 - Integrate financial decisions with that “one life you can call your own.”
 - Free resources and energy to live authentically and experience meaning, contentment, and fulfillment in life.
 - Monitor actual progress with post – workshop support.
- **Uniqueness – What makes this money program different?**

A Seminar Series that Works because it is Truthful and Practical

- Its non-blaming/shaming look at our common struggle with bringing our financial decisions into alignment with our genuine longings.
- Its commitment to address the causes rather than merely the symptoms of our money suffering.
- Its divergence from the existing financial services industry model that sells product rather than factual guidance – and it’s offering of a way to finally give money our attention and intuition.
- Its comprehensive approach to “giving money our attention rather than our energy”, including facing unconscious destructive beliefs, document organization, budgeting, debt and credit card management, insurance analysis, investment management, tax and social dues planning, retirement planning, and estate planning.
- Its balance through instructor experience. Paul Lemon is a CPA and Certified Financial Planner Practitioner with 32 years of professional experience as well as authoring 2 personal finance

books. He maintains a daily practice of meditation that helps him personally practice mindfulness.

- Its context of offering the Series. Employees experience the Employer's concern for their day-to-day struggles with money in creating space in their busy lives for them to develop skills that will empower a shift into money attentiveness.

- **Methodology – How is the series packaged?**

1. "Try it...you'll like it" format. Try Session 1 before committing to entire Series. Core Session Designed to Stand Alone.

- Core Session - "Money Made New: The Big Picture, Money Details & What's Really Enough?"
- Revolves around *Ahoy, Money! How to Chart Your Course to Genuine Financial Freedom* by Paul Lemon
- Suggested Schedule:

Pre-workshop homework – 4-6 hours over 4 weeks prior to Session.

Saturday:

7:30 to 8:00	Continental Breakfast
8:00 to 12:00	Morning Sessions
12:00 to 12:30	Box Lunches
12:30 to 4:30	Afternoon Sessions

- Upon initial registration – at least 4 weeks prior to the Core Session – each participant is sent an *Ahoy, Money!* book, along with access to Webinars that explain the weekly homework assignments that prepare them for the Seminar.
- At the Seminar, each participant is provided a Workshop Notebook which includes these essentials of money transformation;
 - Insight into false money beliefs – cultural and personal
 - Linking information with intuition in financial decision-making.
 - Discovery of where "their" money is actually going
 - Defining what is "enough" money
 - Designing a budget that really works.
 - Determining how much to save for retirement
 - Facing the pitfalls of investing
 - Preparing for emotional resistances to change.

- Remaining **Money Made New** sessions available through the **Aliveguide** format online if so desired. These sessions are designed to work well in either an individual or small group context.
 - On-line forum offering Paul's 2nd book *Ahoy, Money – How to Chart Your Course to Genuine Financial Freedom*, which covers similar content as the Core Session.
 - Other *Aliveguide*'s offered throughout 2008/2009 that guide participants through Paul's entire Course – *Ten Weeks to Financial Awakening*.
 - Approximate cost per individual *Aliveguide* - \$150

2. **Money Made New Series** – Preferably Offered on a Quarterly Basis to allow for a comprehensive and cohesive restructuring of participants' relationship with money over the course of 12 months.
 - Quarter 1: Money Made New – 101:
 “The Big Picture, Money Details, What’s Really Enough?”
 (Core Session) – Materials: *Ahoy, Money!* book and Notebook
 - **Outcome: Money as a mirror to my authentic life.**
 - Quarter 2: Money Made New – 201:
 “Work /Retirement & Debt “- Materials: *Ten Weeks to Financial Awakening Guidebook* and 4 CD Set and Notebook
 - **Outcome: Contentment and mature presence with my life and finances.**
 - Quarter 3: Money Made New – 301
 “Investing & Insurance” – Materials: Notebook
 - **Outcome: Respecting life’s seasons and my frailty through my investing and insurance decisions.**
 - Quarter 4: Money Made New – 401:
 “Taxes and Estate Planning” – Materials: Notebook
 - **Outcome: Paying my social dues and embracing my mortality – generosity and authentic living.**

(Each Session would follow the same basic time and preparatory homework schedule as outlined above for the Core Session).

Program Investment Summary:

Seminar Fee – Per Session	\$1,500
Materials Fee	\$30/attendee/session couples can share 1 set of materials)
Travel/Lodging/Meals	Speaker’s Plane average \$500 Speaker’s Hotel average \$250 Sat. meal cost estimate \$250
Example:	Seminar Fee \$1,500 Travel Costs 750 Meals <u>250</u> Total \$2,500 50 Attendees \$50/person Material Costs <u>30/person</u> Registration Fee \$80/person
	Cost to Company - \$2,500/session Cost to Employee - \$30/session

Testimonials from prior Workshop attendees:

“We enjoyed the day. It was very helpful in evaluating our goals.”

“The workshop was so helpful and inspirational.”

“I loved having the chance to express all this with other people.”

“It was helpful doing the ‘nitty-gritty’, “learning through the fingers”, comprehensive look at all factors of our finances.”

“You helped us get acquainted and put us at ease with one another.”

For More Information Please Contact:

Money Made New Seminars

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