

# FINANCIAL WISDOM FINANCIAL TOOL KIT

PROVIDE CONSUMERS ADDITIONAL VALUE ON YOUR WEBSITE

## Financial Tool Kit

Add one link to your website and it will become the essential tool for your website visitors to take control of their financial future. The **Financial Tool Kit** enables visitors to make better-informed financial decisions. It becomes the link between their needs and your products.

### Position your products as solutions to consumers' needs:

- Simplify day-to-day finances
- A financially secure retirement
- Fund college educations
- Improved investment results
- Reduced taxes
- Financial peace of mind

### The Financial Tool Kit will produce results:

- Cross-sell and up-sell
- Reduce account attrition
- Increase inquiries
- Increase website traffic
- Lengthen website visits

**Adding the Financial Tool Kit is easy, fast and simple.**

**Let us activate your branded site and you will see the value.**

**No Obligation!**

**Call 800-723-7237 to get started.**

### If Your Home Page Has These Navigation Links...

- About Us
- Products & Services
- Online Banking
- Apply Now
- Locations
- Calculators

### It Should Also Have This Link

- **Financial Tool Kit**

Providing website visitors with tools to help them manage their finances more intelligently is now easy with the **Financial Tool Kit**. This “branded” suite of useful tools will add value to your website and help make your site the effective marketing tool it can be.

Checklists to manage your finances	Worksheets to organize your finances	Financial Library to help you learn more	Calculators to analyze your alternatives
<a href="#">Basic Financial Planning</a>	<a href="#">Personal Balance Sheet</a>	<a href="#">General Financial Articles</a>	<a href="#">Mortgage Payment</a>
<a href="#">Simplify Your Finances</a>	<a href="#">Household Spending</a>	<a href="#">Residence &amp; Home Ownership Articles</a>	<a href="#">Mortgage Refinancing</a>
<a href="#">Annual Financial Physical</a>	<a href="#">Home Ownership</a>	<a href="#">Insurance Articles</a>	<a href="#">Retirement</a>
<a href="#">Managing Your Debt</a>	<a href="#">Insurance Policy Information</a>	<a href="#">Investment Articles</a>	<a href="#">IRA Comparison</a>
<a href="#">Insurance Review</a>	<a href="#">Retirement Plan Information</a>	<a href="#">Retirement Articles</a>	<a href="#">College Funding</a>
<a href="#">Annual Investment Review</a>	<a href="#">Income Tax Information</a>	<a href="#">Income Tax and Estate Planning Articles</a>	<a href="#">Present Value</a>
<a href="#">Retirement Planning</a>	<a href="#">Household Inventory</a>	<a href="#">Issues Facing Parents</a>	<a href="#">Future Value</a>
<a href="#">Income Tax Planning</a>	<a href="#">Personal Contacts</a>	<a href="#">Small Business Articles</a>	<a href="#">Savings Goals</a>
<a href="#">Estate Planning</a>	<a href="#">Locations of Important Papers</a>		<a href="#">Portfolio Rate of Return</a>

**The Financial Tool Kit stimulates actions.**

Visitors can download and print the Checklists and Worksheets to record their decisions and monitor their progress. The Checklists pose questions or address critical issues (supported by informative articles) that lead to decisions and actions. The link back to your site enables them to see how your products and solutions can help them reach their financial goals.

**Make it easy for website visitors to get the help they want and need.**

Explore the Financial Tool Kit by visiting the Financial Wisdom website—[www.financialwisdom.com](http://www.financialwisdom.com). Click on **Financial Tool Kit** and see how the Checklists, Worksheets and Library of Articles would be valuable additions to your website. Your website visitors would have the same experience, only it would be branded with your name and logo.

Give your website visitors the tools they need to make the right financial decisions. Providing those tools is fast, simple and easy. One link to the Financial Tool Kit is all it takes.

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## Financial Tool Kit

The Financial Tool Kit is designed to help individuals organize their finances, better understand financial issues, make decisions and to facilitate actions. There are four components.

**Financial Checklists** – All nine Checklists identify key issues or pose critical questions. The reader is then directed to an associated article in the Financial Library so they can learn more. In addition, the Checklist points out how your organization can assist in implementing a solution.

**Worksheets** – The nine Worksheets can be downloaded and used to record and store important financial and family information.

**Financial Library** – Organized into topical areas that relate to readers' financial concerns, the Library includes over 75 informative and useful articles.

**Calculators** – The eight Calculators are just some of the tools visitors can use to become better-informed consumers.

### How does it work?

The Financial Tool Kit will be branded with your name and logo. All we need is your logo and the url of where you want visitors to click to.

We activate the service (usually within a day) and send you the link to add to your site.

You may already have links to calculators or other tools. You could simply add a link to "Financial Tool Kit" or create a new link to a comprehensive suite of services with a "roll-over" or "drop-down menu" to the different tools you offer. You might call it Financial Tools, Education, Learning Center, Solutions, Managing Your Finances, Learn About or some other engaging descriptive term.

The HTML files for the Financial Tool Kit are also available as part of the Financial Wisdom Library of Content service if you choose to manage it as part of your site.

FINANCIAL WISDOM		Brought To You By		FOREST BLUFF FINANCIAL SERVICES	
ONLINE		Financial Tool Kit			
Basic Financial Planning Checklist					
It can be very easy to put off taking care of your long-term financial affairs. Here is a checklist to help you identify steps to put you on the road to a secure (and less stressful) financial future.					
Date	Item	Actions Needed	Taking Action	Articles From Library	
/ /	<b>Develop a financial reserve.</b> Being prepared (with 3 to 6 month's living expenses) can help relieve some of the financial anxiety we often feel.  Consider an automatic savings plan with some amount being deposited into a savings account from each paycheck. The fund will grow and you may end up not even missing what is saved each month.	1. 2. 3.	Enroll for direct deposit of your payroll or government checks.  Enroll for an automatic savings plan to transfer \$_____ to your savings account each month.	<a href="#">Developing a Financial Cushion</a>	
/ /	<b>Get rid of high interest rate credit card debt.</b> Interest rates on some credit cards are high. If you are carrying over balances and paying interest, cut down on your card use, pay more than the required monthly minimum and eliminate this expense. Also, you may want to consider a different credit card that offers a lower rate.	1. 2. 3.	Review credit card terms to find the one that is right for you.	<a href="#">Evaluating Credit Cards</a>	
/ /	<b>Develop a household budget.</b> This is often one of the most dreaded parts to being financially responsible. To make the process less dreaded, call it a "household spending analysis." Determining how you spend your money will probably lead to identifying how to reduce some expenses.	1. 2. 3.	Download a household spending analysis worksheet.		
/ /	<b>Save for retirement.</b> Start with your employer's retirement plan. Review the details to ensure you get as much of the "company match" as possible.  After considering your employer's plan, consider contributions to an IRA or Roth IRA. The tax deferred compounding aspects of these plans enable your funds to grow faster.	1. 2. 3.	Meet with a financial advisor to determine how the investments within your employer plan fit within your overall investment strategy.  Contribute to an IRA for yourself and your spouse.	<a href="#">Rethinking Retirement</a>  <a href="#">Take Full Advantage of Your Employer's 401(k) Plan</a>  <a href="#">An IRA Refresher</a>	

Each item encourages the reader to learn more, make decisions and take actions.

### What does it cost?

The cost of the Financial Tool Kit is \$300 per month. Billing is quarterly in advance with no set-up fee or long-term commitment.



Helping website visitors reach their goals will pay dividends for them and your organization.

The Financial Tool Kit makes your website a "destination for financial literacy." Make your website a more productive marketing tool while providing visitors tools they need to reach their financial goals. Visit the Financial Wisdom website – [www.financialwisdom.com](http://www.financialwisdom.com) – to explore a sample Financial Tool Kit. Call or email to learn more or start the service.

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