UD OLLI ONLINE

Spring 2021

10 Personal Finance Tips

Course Content

Five Week Course

Week 1: Understand What Assets You Own and What Liabilities You Have; Understand Tax Consequences of Various Accounts

Week 2: Understand Your Sources of Income and Expenses; Budgeting; Understand Options in a Financial Emergency

Week 3: Protect Yourself Online and Handling Yourself if You are a Victim of Identity Theft or Fraud

Week 4: Know How to Keep Good Records

Week 5: Choosing Advisors and Granting Others Access to Your Financial Affairs