Building a Financial Plan for School and the Future

For over 28 years, this financial planning seminar series has been offered to Thomas Jefferson University students and hospital residents.

"Building a Financial Plan for School and the Future" is designed to provide important information to all current TJU students and JHS housestaff who face decisions concerning repayment of their educational debt; developing a workable financial plan, including an insurance program; getting the most out of their income; and going into practice. Seminar speakers are experts on their respective topics and will address individual questions in the question and answer session which follows.

2016 Seminar Series Schedule

When:
All sessions begin promptly at the time indicated. Refreshments will be served 15 minutes prior.

Where:
Check each session for specific location information.
If you have any questions, please contact the TJU Financial Aid Office at (215) 955-2867 or at financial.aid@jefferson.edu

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First session

Tuesday, February 16
Foerderer Auditorium, 6:15 p.m. to 7:30pm

Managing Educational Debt
Susan McFadden, University Director of Financial Aid, Thomas Jefferson University

Second session

Tuesday, February 23
Room 101 - BLUEMLE Building, 12:00 Noon to 1pm

What You Should Know about Insurance
Richard D. Scott, CLU, Insurance Planning Group, Inc.

Third session

Wednesday, March 16
Foerderer Auditorium, College Building, 6:15 p.m. to 7:30pm

What Everyone Should Know about Personal and Professional Financial Planning
Timothy Valente, Senior Vice President, Financial Advisor, RBC Wealth Management

Fourth session

Wednesday, March 23
Eakins Lounge JAH, 12:00 Noon to 1pm

What You Should Know about Mortgages
Joan Kofsky, Finance of America Mortgage

Fifth session

Tuesday, March 29
Eakins Lounge JAH, 12:00 Noon to 1pm

Taking Control of Credit- Building a Foundation
David Wheeler, Credit Plus, Inc.

Sixth session

Tuesday, April 5
Eakins Lounge JAH, 12:00 Noon to 1pm

Practical and Legal Considerations of Planning Your Professional Future
Joseph R. Pozzuolo, Esq., Pozzuolo Rodden, P.C.

Speaker Information

Joan Kofsky - Joan is the Location Manager at the Wayne PA branch of Finance of America Mortgage. She has been in the banking industry for more than 30 years. Joan will discuss information on acquiring a mortgage considering the current turmoil in the mortgage industry.

Susan McFadden - Susan is currently the University Director of Financial Aid at Thomas Jefferson University. Susan has worked for Jefferson for over 29 years. Susan's presentation will provide sound information, strategies and examples about managing the increasing educational debt that students and graduates are facing today.

Joseph Pozzuolo, Esq. - Joe is from the law firm of Pozzuolo Rodden, P.C., located in Philadelphia. Mr. Pozzuolo discusses a presenter since the inception of this Seminar Series 28 years ago, discusses the importance of contract specificity and issues that graduates should consider when starting a practice or entering into business with an associate or group of associates.

Richard D. Scott - Richard is from the Insurance Planning Group, Inc. in Rosemont, Pa. Rich has more than 30 years of experience in the insurance industry. Rich will provide free and sound advice about the importance of insurance and the fundamentals.

Timothy Valente - Tim is from the Valente Investment Group of RBC Wealth Management in Philadelphia. Tim has been in the financial services industry since 1988. Tim's discussion will focus on the retirement investment options available now and for the future as well as the importance of starting a retirement plan early in conjunction with playing off student loans.

David Wheeler- David is a Regional Account Executive for Credit Plus, Inc. In the last decade of being a credit trainer and developer, Dave has been recognized as one of the country's leading credit scoring experts. Through his relationships with Fair Issac and CreditXpert, he has developed scoring models, designed MBA and Realtor courses, written case studies for congressional testimony, and brings focused attention to risk assessment for lending institutions. Much of his work today centers around bringing best education and practical application to the market.