Building a Financial Plan for School and the Future

For over 30 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 legal considerations of employment contracts. Seminar speakers are experts on their respective topics and will address individual questions in the question and answer session that follows.

2020 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 - **DIY: Personal Budgeting**
Susan McFadden, Executive Director of Financial Aid, Thomas Jefferson University
Momo Nakagawa, Research Data Analyst, Thomas Jefferson University
Thursday, March 5 12:00 noon-12:55
Room 101, Bluemle Life Sciences Building (BLSB)

Second session - **Insurance Fundamentals**
Richard D. Scott, CLU, Financial Planner, Insurance Planning Group
Mindi Vogel, Megro Benefits Co., Conshohocken, Pa
Tuesday, March 10 12 noon – 12:55 pm
Herbut Auditorium, College Building

Third session - **Managing Educational Debt**
Susan McFadden, Executive Director of Financial Aid, Thomas Jefferson University
Thursday, March 12 5:00 pm dinner; 5:15 pm – 6:30 pm presentation
College Building, Foerderer Auditorium

Fourth session – **First Time Mortgage and Home Buying Fundamentals**
Joan Kofsky, Sr. Loan Officer/Location Manager, Finance of America Mortgage LLC
Kelly Steyn, Real Estate Agent, Keller Williams Realty
Monday, March 23 12 noon – 12:55 pm
Eakins Lounge, Jefferson Alumni Hall (JAH)

Fifth session - **Taking Control of Credit – Building a Foundation**
David Wheeler, Regional Account Executive, Credit Plus, Inc.
Tuesday, March 24 12 noon – 12:55 pm
Eakins Lounge, Jefferson Alumni Hall (JAH)

Sixth session - **What Everyone Should Know about Personal and Professional Financial Planning**
Timothy Valente, Senior Vice President, Financial Advisor, RBC Wealth Management
Thursday, March 26 6:00 pm dinner; 6:15 pm – 7:30 pm presentation
Foerderer Auditorium, College Building

Seventh Session– **Practical and Legal Considerations - What is in an Employment Contract**
Joseph Pozzuolo, Esq., Pozzuolo Rodden, PC
Thursday, April 2 12 noon – 12:55 pm
Room 207, Jefferson Alumni Hall (JAH)

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 Executive Director of Financial Aid at Thomas Jefferson University. Susan has worked for Jefferson for over 30 years. Susan's presentation will provide sound information, strategies and examples about managing the increasing educational debt that students and graduates are facing today, and tips for effective personal budgeting.

Momo Nakagawa – Momo is a Research Analyst in the Office of Institutional Research at Thomas Jefferson University. Momo's presentation will focus on financial budgeting methods she has explored and adopted as a recent graduate.

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 30 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.

Kelly Steyn – Kelly is a Realtor with Keller Williams Realty. She specialized in assisting First Time homebuyers. Her presentation will speak to this population and what is important to consider.

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.

Mindi Vogel – Mindi is a Benefits Advisor with The Megro Benefits Company where she specializes in building competitive benefit plans for emerging companies and university student groups. She is a licensed Health and Life Agent and Self – Funding Certified. Mindi will speak to the current Affordable Care Act and how to understand the complexities.

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.