



## **FOR IMMEDIATE RELEASE**

**Date:** Tuesday, August 5, 2014

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**News tips/Keywords:** Anthem, Civic Building, finances, planning, estate, budget, classes, free seminar, investments, retirement

## **ANTHEM COMMUNITY COUNCIL TO HOST FREE FINANCIAL PLANNING SERIES AT CIVIC BUILDING**

**Anthem, Ariz.** – Anthem residents are invited to attend the first education series at the new Anthem Civic Building in September. Financial professional and Anthem Community Council Board of Directors member Ryan Halleran will lead the five-week series, which is free to attend.

The series will kick off on **September 11 at 6:30 p.m.** with budgeting and financial management for families. Halleran will cover how to work toward financial goals, including the use of savings/checking accounts, credit/debit cards and proper allocations to reserve for financial obligations such as emergency funds, college education and 401ks.

The remainder of the series includes:

- Personal investments (Sept. 25, 6:30 p.m.)  
This is a beginner's guide to the investing world. Learn the different types of investments, investment accounts and the proper way to begin an investment portfolio. The difference between active vs. passive investing will be distinguished and the value of having an equal balance of both will be explained.
- Retirement investments and planning (Oct. 9, 6:30 p.m.)  
Discuss different ideas on how to plan out retirement and monitor and update those retirement plans as life evolves. Topics will include how often to "rebalance," "dollar cost averaging" and the "Efficient Frontier Model."

- Social Security, Medicare, long-term care insurance (Oct. 23, 1 p.m.)  
Learn about post-retirement planning and guidance; the types of Medicare coverage which are available and necessary vs. optional; and how to determine the proper need for and/or coverage of long-term care insurance.
- Estate planning (Nov. 6, 6:30 p.m.)  
Learn about the different types of wills and trusts, the importance of beneficiary planning and designations and tax/legal benefits to using these vehicles within estate planning.

To register for any or all classes in the series: [OnlineAtAnthem.com/acb-programs](http://OnlineAtAnthem.com/acb-programs). For more information, contact Jan Sieber, [jsieber@anthemcouncil.com](mailto:jsieber@anthemcouncil.com) or 623-742-6020.

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**Anthem, Arizona** is a master planned community located in Maricopa County, Arizona. The Anthem Community Council, Inc. serves as a unifying entity for the Anthem community. The mission of the Anthem Community Council, Inc. is to establish and maintain a governing structure which will preserve, protect and enhance the plans, policies, infrastructure and resources needed to support a sense of community, ensure sound economic development and promote a quality of life for all Anthem residents.