



HUECU WINTERSESSION JANUARY 22 - 23

FINANCIAL INDEPENDENCE: WHY MANAGING YOUR FINANCES MATTERS

AGENDA

BOYLSTON HALL: FONG AUDITORIUM 110

WEDNESDAY, JAN. 22

10:00 AM - 2:00 PM

INVESTMENT, BENEFITS AND BUDGETING

- 10:00 AM INTRODUCTIONS
- 10:15 AM **MANAGE YOUR INVESTMENT PORTFOLIO**
SHAHAR ZIV, *PAYPAL*
- 11:45 AM LUNCH (PROVIDED)
- 12:15 PM **BENEFITS: THE OTHER FORM OF COMPENSATION**
DEE DEE CHAN,
PARTNERS HEALTHCARE
- 1:15 PM **BUDGETING**
MIGDALIA GOMEZ, *HUECU*
- 1:45 PM WRAP UP

THURSDAY, JAN. 23

10:00 AM - 2:00 PM

INSURANCE, TAXES, RETIREMENT AND CREDIT

- 10:00 AM INTRODUCTIONS
- 10:15 AM **INSURANCE AND TAXES**
PATRICK DONNELLY, MATT ILTERIS,
AND IAN COLE, *COLONY GROUP*
- 11:45 AM LUNCH (PROVIDED)
- 12:15 PM **RETIREMENT CASE STUDY**
JAKE NORTHRUP,
EXPERIENCE YOUR WEALTH
- 1:15 PM **MAKING CREDIT WORK FOR YOU**
MIGDALIA GOMEZ, *HUECU*
- 1:45 PM WRAP UP

SECURE YOUR SPOT:

[HUECU.ORG/WINTERSESSION](https://huecu.org/wintersession)

