Denali Alaskan FEDERAL CREDIT UNION
Investment Services

Money Matters!

Schedule a workshop for your staff today.
You choose the topic….

Investment Fundamentals –
Making Informed Investment Decisions
This seminar provides beginning investors with basic investment information to help them start an effective investment program.

Topics:
Why Do We Invest?
Stocks
Bonds
Mutual Funds
Annuities
Investment Approaches
Investment Strategies
Figuring Out Your Net Cash Flow
Figuring Out Your Net Worth

Asset Allocation –
Determining the Right Investment Mix
This seminar explains asset allocation, identifies risks, and shows strategies for potentially maximizing investments.

Topics:
Asset Allocation
What is Risk?
Asset Allocation and Diversification
Asset Allocation Steps
Figuring Out Your Net Cash Flow
Figuring Out Your Net Worth

Retirement –
Building a Comfortable Lifestyle for Tomorrow
This seminar explains how to calculate the cost of retirement and emphasizes the importance of personal savings and sound investment strategies for retirement.

Topics:
Retirement Income
Retirement Questions
Calculating the Cost
Sources of Retirement Income
Retirement Timing
Figuring Out Your Net Cash Flow
Figuring Out Your Net Worth

Financial Management –
Achieving Financial Success
This seminar shows the importance of developing a financial management program to help achieve financial success.

Topics:
Your Financial Future
Cash Management
Risk Management
Investment Planning
Tax Planning
Retirement Planning
Estate Planning
Figuring Out Your Net Cash Flow
Figuring Out Your Net Cash Worth

Tax Strategies - Using Advanced Strategies to Reduce your Taxes
This seminar illustrates how to use tax-reduction strategies to realize potentially substantial financial savings.

Topics:
The Income Tax Burden
How do Income Taxes Work?
How Can You Reduce Your Income Taxes?
Tax Filing Reminders
Tax-Favored Investing & Saving
Tax Planning Opportunities
Strategies for Homeowners
What if You Get Audited?
Figuring Out Your Net Cash Flow
Figuring Out Your Net Worth

Other Topics Available:
- Pension Distribution Options
- Taxable vs. Tax Deferred
- 529 Plans – Planning for College
- Expenses
- Retirement for One

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www.denalifcu.org

Contact Eileen at 907-257-7245 to schedule a presentation today!
(Anchorage and vicinity only)

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For specific tax advice, please consult a qualified tax professional.