Consumer Mastermind

About Our Consumer Mastermind Series

The goal of this series is to provide a safe and comfortable space to discuss the 12 essential consumer financial topics that contribute to much of our overall financial wellbeing. The topics are broken up into two parts, a "1.0" and "2.0," which are six weeks each and led by a Pinnacle associate.

The Financial Topics That Are Covered

Consumer Mastermind 1.0

- **Week 1: Money Mindsets**
  The Importance of Finding Your Why
- **Week 2: A Budget that Works**
  Keys to Intentional Spending
- **Week 3: Give Yourself a Raise**
  A Penny Saved is a Penny Earned
- **Week 4: Using Credit Wisely**
  Tips for Managing Your Credit
- **Week 5: Automobile Advice**
  Buying or Selling a Vehicle
- **Week 6: Homebuying Hacks**
  The Process of Buying a Home

Consumer Mastermind 2.0

- **Week 1: Insurance Needs**
  Insuring What Matters
- **Week 2: Investing Insights**
  Opportunities to Build Wealth
- **Week 3: Taxable Topics**
  Big Picture Considerations
- **Week 4: Retirement Radar**
  Plan for What's Ahead
- **Week 5: Estate Planning**
  Leaving Your Legacy
- **Week 6: Information Security**
  Keeping Your Data Safe

Why We're Offering This

Learning is one of Pinnacle's seven values. As part of our commitment to our clients and the communities we serve, we offer financial education workshops and classes for continuous learning opportunities.

If You'd Like to Learn More

Reach out to your Financial Advisor or stop by a local office near you.

Presented by Pinnacle Financial Partners

OUR VALUES:

Integrity Partnership Fairness Results Learning Balance Discipline