Reducing Financial Stress

Start Date: 4/14/2021 7:30 AM

End Date: 4/14/2021 10:00 AM

Reducing Financial Stress

Matthew Pitti - Senior VP, Wealth Advisor -The Pitti Group Wealth Management

Wednesday, April 14th 2020

8:00am - 10:00am

** THIS IS A VIRTUAL PROGRAM **

This program has been pre-approved for 1.5 Professional Development Credits (PDCs) by the Society for Human Resource Management and 1.5 HR General credits by the HR Certification Institute

Often times employees & families feel financial stress especially. We’ll talk about ways that employees and families can keep that stress in check and discuss some best practices for personal financial management.

By the end of this session, participants will:

• Learn how to help employees budget

• Learn how to help employees reduce their income tax burden

• Learn essentials for helping employees manage a household financial plan

About the Speaker:

Matt is a graduate of the State University of New York at Cortland where he majored in Economics. He has over ten years of experience in the financial services industry.

When working with clients, he focuses on developing customized wealth planning strategies to not only fit his clients' needs today but help get them to where they need to be in the future. By holding insurance and long-term care licenses in addition to securities registrations, he is able to take a holistic approach when working with clients. With our 401(k) clients, Matt helps plan sponsors meet their fiduciary responsibilities as well as guide the employees in building individualized retirement plans.