

## 2023 EFC FOUNDATIONS SERIES

EFC - Encouraging Financial Conversations is a program designed for case managers, social workers, and other frontline staff to help empower clients achieve their financial goals and manage their money. EFC participants will learn techniques and strategies to help their clients create a financial goals action plan, build and maintain good credit, pay off debts, write a spending and savings plan, and protect themselves from fraud and identity theft.

### 3-Week Virtual Lunch & Learn!

#### OCTOBER 2023 - TUES & THURS

**TUES**  
OCTOBER 3

**TUES**  
OCTOBER 10

**TUES**  
OCTOBER 17

**THUR**  
OCTOBER 5

**THUR**  
OCTOBER 12

**THUR**  
OCTOBER 19

11:30AM - 12:30PM LUNCH & LEARN



#### QUESTIONS? CONNECT LOCALLY

Pattie Carroll (Dodge)  
[patricia.carroll@wisc.edu](mailto:patricia.carroll@wisc.edu)

Carol Bralich (Washington)  
[carol.bralich@wisc.edu](mailto:carol.bralich@wisc.edu)

Katie Gellings (Outagamie)  
[katie.gellings@wisc.edu](mailto:katie.gellings@wisc.edu)

Todd Wenzel (Winnebago)  
[todd.wenzel@wisc.edu](mailto:todd.wenzel@wisc.edu)

Kimberly Clark (Fond du Lac)  
[kimberly.s.clark@wisc.edu](mailto:kimberly.s.clark@wisc.edu)

**REGISTER FOR EFC NOW!**

REGISTRATION IS REQUIRED TO ACCESS ZOOM

#### EFC FINANCIAL DISCUSSION TOPICS



**FINANCIAL CONVERSATIONS**



**SETTING GOALS**



**MAXIMIZING INCOME**



**SPENDING**



**SAVING**



**BORROWING**



**PROTECTING YOUR MONEY**