

CENTER [®]

REALTOR [®]

FINANCIAL WELLNESS

FinancialWellness.realtor

Presented By: Rich Arzaga & Brittany Schanck





Program Overview

- Quick and easy financial check-up
- Personalized goal recommendations
- Calculators, Planners & Worksheets
- Resource Library for Career Stage

Visit: FinancialWellness.realtor





1 Volunteer to Participate in RISK-FREE Activity





1



2



3



4





\$200,000



\$25,000



\$4,000



\$120,000





Less than 1% chance of failure. Home Insurance

✓
\$200,000



Less than 1% chance of failure. Car Insurance

✓
\$25,000



Less than 1% chance of failure. FDIC Insurance

✓
\$4,000



\$120,000





Less than 1% chance of failure. Home Insurance



\$200,000



Less than 1% chance of failure. Car Insurance



\$25,000



Less than 1% chance of failure. FDIC Insurance



\$4,000



Around 40% chance of failure. LTC Insurance



\$120,000





FinancialWellness.realtor



Personal Edition:

A 60-Second Personal Financial Wellness Audit for REALTORS® and Their Families

To help benchmark your personal financial condition as you enter this business, the Center for REALTOR® Financial Wellness invites you to take this 60-Second Wellness Audit. Your responses will help gauge how prepared you are with your finances.

	Yes	No/Not Sure
1. Have you assessed how much in savings and other household income you have available to cover personal expenses while launching your business?	[]	[]
2. Given the higher need for liquidity and capital when launching a business, have you updated your current investments' asset allocation?	[]	[]
3. Is your overall financial plan current and reviewed annually? Are you aware of the most current planning strategies?	[]	[]
4. Do you own alternative investments (real estate, loans, currency) and similar strategies that could potentially reduce portfolio volatility?	[]	[]
5. Do you know if you own too much, too little, or just enough life insurance?	[]	[]
6. Will your health insurance provider, coverage, cost, or needs changed?	[]	[]
7. Has your estate plan been reviewed by a licensed professional in the past five years, or sooner if there have been changes involving people in your family, people listed in the documents, or assets?	[]	[]
8. Have you prepared for potential long-term care needs as you get older?	[]	[]
9. Do you know how you can use your real estate business to reduce the cost of personal long-term care?	[]	[]
10. Do you know how much you will need to save between now and when you declare financial independence, to preserve your current standard of living?	[]	[]

If you answered [Yes] to all questions, then congratulations! See how you rated on the Financial Wellness Audit chart. Regardless of your score, it is never too late to strengthen your business!

The NATIONAL ASSOCIATION OF REALTORS® proudly introduces the Center for REALTOR® Financial Wellness, an online resource designed to meet the specific financial planning needs of REALTORS®. This complimentary program provides budgeting tools, retirement planning resources, options for investing in real estate and more. Log-in to www.FinancialWellness.realtor to take an assessment and start planning for your future today!

SCORING YOUR FINANCIAL WELLNESS AUDIT

FOR EITHER PERSONAL OR BUSINESS



1 to 4 CORRECT

Don't worry,
NAR has your back!

Take advantage of FinancialWellness.realtor educational resources, self assessment test, and recorded webinars on various financial topics. You can also visit nar.realtor/cffw to access additional information.

5 to 8 CORRECT

You're off to a good start!

Visit FinancialWellness.realtor to take the free financial wellness checkup and track the progress of your personalized financial wellness goals.

Don't forget to download the financial roadmap to stay on track.

9 or 10 CORRECT

Cue applause!

Keep honing your financial literacy with help from the Center for REALTOR® [Financial Wellness](http://FinancialWellness), which provides National Association of REALTORS® members with tools and information on everything from budgeting to starting a business.

The National Association of REALTORS® proudly introduces the Center for REALTOR® Financial Wellness, a resource designed to meet the specific financial planning needs of REALTORS®.

This complimentary program provides budgeting tools, retirement planning resources, options for investing in real estate and more.

Log in to FinancialWellness.realtor to take an assessment and start planning for your future today!





Let's Discuss!



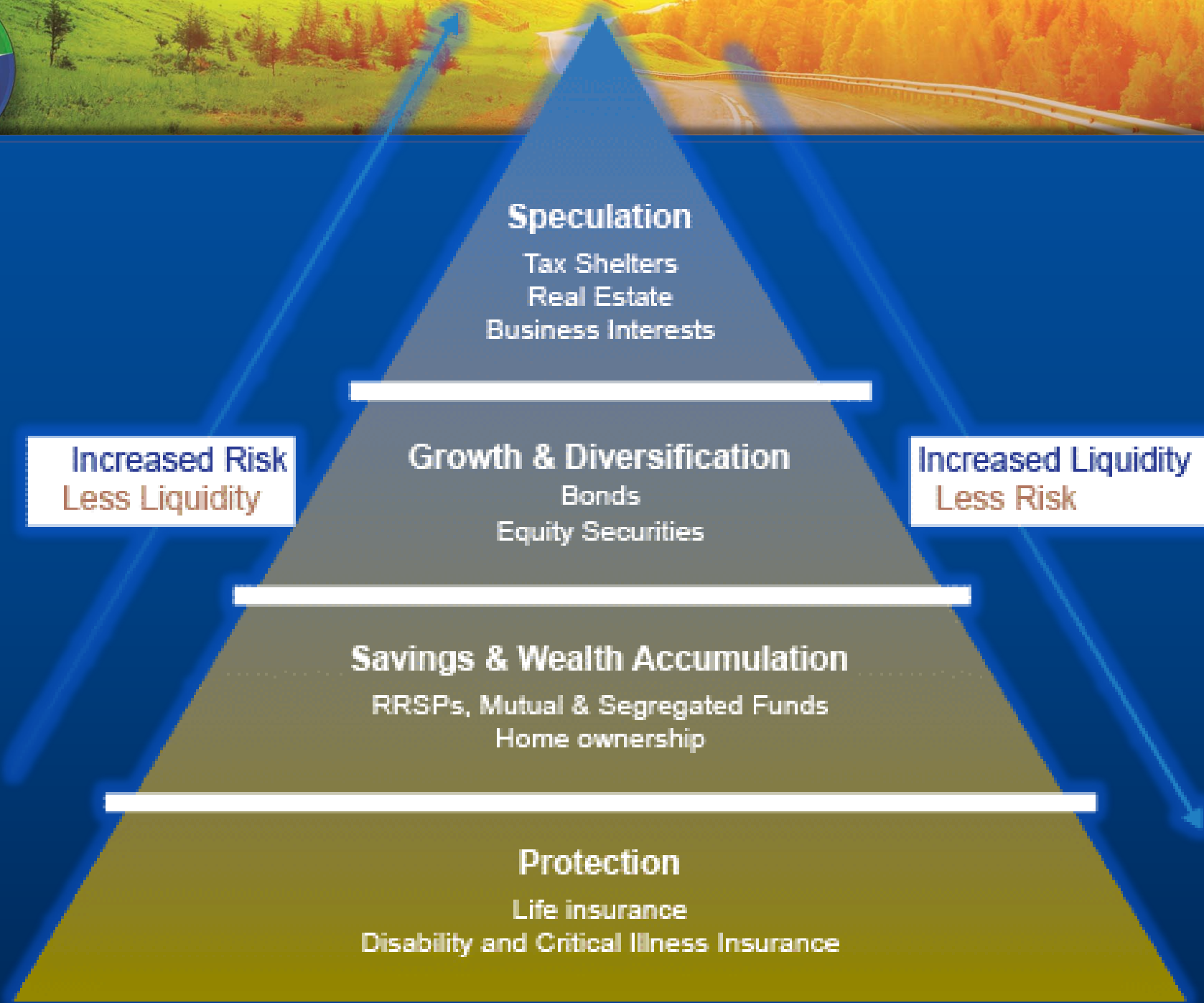
Rich Arzaga
CFP®, CCIM, and former REALTOR®

The Real Estate Whisperer



Brittany Schanck
Financial Wellness Manager

National Association of REALTORS®





Fine & Well

NAR 2023 February Tax Summit

UPCOMING WEBINAR - February 1,8,15,22 @1 PM CT

Register - nar.realtor/CFFW/live





Questions?

**NOTE: PLEASE BE MINDFUL OF PERSONAL
FINANCIAL QUESTIONS.**

FinancialWellness@nar.realtor



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FINANCIAL WELLNESS

Thank You!

Visit:

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Get Started:

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