

# YUKON LEARN SOCIETY

## FLEXIBLE COURSE SERIES

For Various Aspects of Personal Financial Management

### The Objective

Explore Our Flexible Course Series!

We are excited to offer a series of five diverse courses, each designed to provide valuable insights and skills in personal financial management.

You have the freedom to choose which courses best suit your interests and needs. Whether you want to attend one course or all five, the choice is entirely up to you.

### Course Options:

- **Unit 1, Your Finances:** Students will gain confidence in making basic financial decisions by refining personal budgets to improve debt management and savings plans.
- **Unit 2, beyond savings and Investing Basics:** Students will become familiar with several types of investments and tax-sheltered plans and be able to use this knowledge for their personal benefit.
- **Unit 3, Active Investing:** Students will become familiar with investment terms and strategies, and various forms of professional advice and other support that is available.
- **Unit 4, The Others in Your Life:** Students will learn how to apply financial concepts and strategies to their relationships with other people and organizations during their life, and beyond.
- **Unit 5, Meet the Taxman:** Students will become familiar with the steps that complete a basic personal tax return and be able to complete their own (basic) tax return, either on paper, or using tax preparation software.

**At the end of each Unit, there will be a half hour Q&A period for participants that have extra questions or need extra assistance, as time permits.**

This is a course that is meant for individuals who want to create or refine their household budget and want to make their money work for them. These courses are filled with tips and tricks that you can use to help you find ways to manage your money yourself, including some strategies using simple math to overcome any fear of numbers. Learn about active investing, tax returns, and much more! Gain the freedom, confidence, and flexibility to tackle your financial issues. This 5-part course is designed to offer separate units based on your interests.

## The Opportunity

### How It Works:

- **Select Your Courses:** Review the course descriptions and choose the ones that appeal to you.
- **Flexible Scheduling:** Attend courses according to your availability.
- **Mix and Match:** Feel free to combine courses to create a tailored learning experience.

Register for any unit(s) with administration of Yukon Learn: [admin@yukonlearn.com](mailto:admin@yukonlearn.com) / (867)668-6280

Join us for any or all these courses and enhance your knowledge at your own pace!

### Timeline

This proposal outlines my recommended dates and times for our course series. The schedule is designed to allow for a potential additional course in the afternoons on the same days, optimizing flexibility and accommodating various participant needs.

Description	Start Date & Time	End Time	Duration
Unit 1: Your Finances	September 27 10am	1pm	3H
Unit 2: Beyond Savings	October 2 10am	1pm	3H
Unit 3: Active Investing	October 4 10am	1pm	3H
Unit 4: The Others in Your Life	October 9 10am	1pm	3H
Unit 5: Meet the Taxman	October 11 10am	1pm	3H

## **Supplied Material**

Yukon Learn will supply all required materials and resources for this course, including documentation, computers, and other necessary equipment.

## **Expected Results**

- **Fundamentals of Personal Finance: income, debt, savings, and budgets**
- **Investing Basics: types (stocks, ETFs, etc.) and RRSP, TFSA accounts**
- **Investing Styles: strategies, advisors, agents, and on-line investing**
- **The Others in Your Life: insurance, wills, and contributions to the community**
- **Taxes: a guided walk through the T-1 General Income Tax Form**
- **To gain an ability to incorporate each module into your everyday life**

## **Prerequisites**

Students should already possess these skills:

- **Basic Numeracy- add, subtract, multiply, divide; and the ability to use a calculator**
- **Basic Literacy- Grade 8-10 Reading Level**