



Urban Affairs Coalition
Driving Change from the Ground Up

Community & Economic Development:

Financial Education Workshops

Host Agency Identification Form

1. Name and address of host agency:
2. Location of workshop:
3. Name of contact person:
 Telephone:
 Email:
 Fax:
4. Date & time of Workshop:
5. How many people are expected to attend the workshop?
6. Do you need promotional items such as flyers and posters to publicize your workshop? If so, how many? (Limit 50)
7. Please choose a topic, see attached for descriptions. (Limit 2 topics. Bank on Philadelphia serves as a 2 topic selection)

Bank on Philadelphia (includes 6 below topics)	Bankruptcy
Spending Plan	Bankruptcy Education
Savings	Credit
Account Management	Getting and Understanding Credit
Banking Products	Building and Maintaining Credit
Cost of Financial Resources	Using Credit Cards
Banking Rights and Responsibilities	Income and Asset Protection
Tax Education	Insurance
Taxes	Predatory Practices
Financial Planning	Predatory Lending
Estate Planning	Identity Theft
Effective Financial Goal Setting	Investing and Savings
Creating a Financial Plan	What should I know about retirement?
Spending Plan and Money Management	Saving
Homeownership	Foreclosure
The Process of Homeownership	Preventing Foreclosure

If you would like to schedule a workshop, please submit this form to Kalie Wertz at kwertz@uac.org or call 215-851-1847 for more information.