



SESSION 4:

MINDFUL MONEY

ATTENDEE WORKSHOP REMINDERS

- For the sake of the recording, you are muted. But please feel free to interact with us in the chat!
- Please mute your phone to avoid any distractions
- Share your favorite moments using #mindfulmoney
- If you're unable to attend live sessions, the video will be posted within 24-48 hours at www.changereaction.org/financial-literacy-year-2

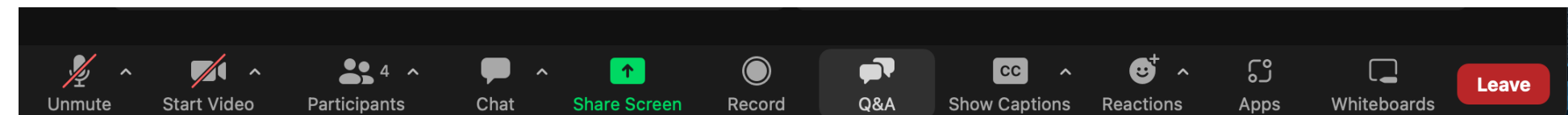
From there, you can also download these slides and any resources mentioned during the workshop.

- Remember, you must finish the entire presentation and enter the code at the end to get credit for attending.

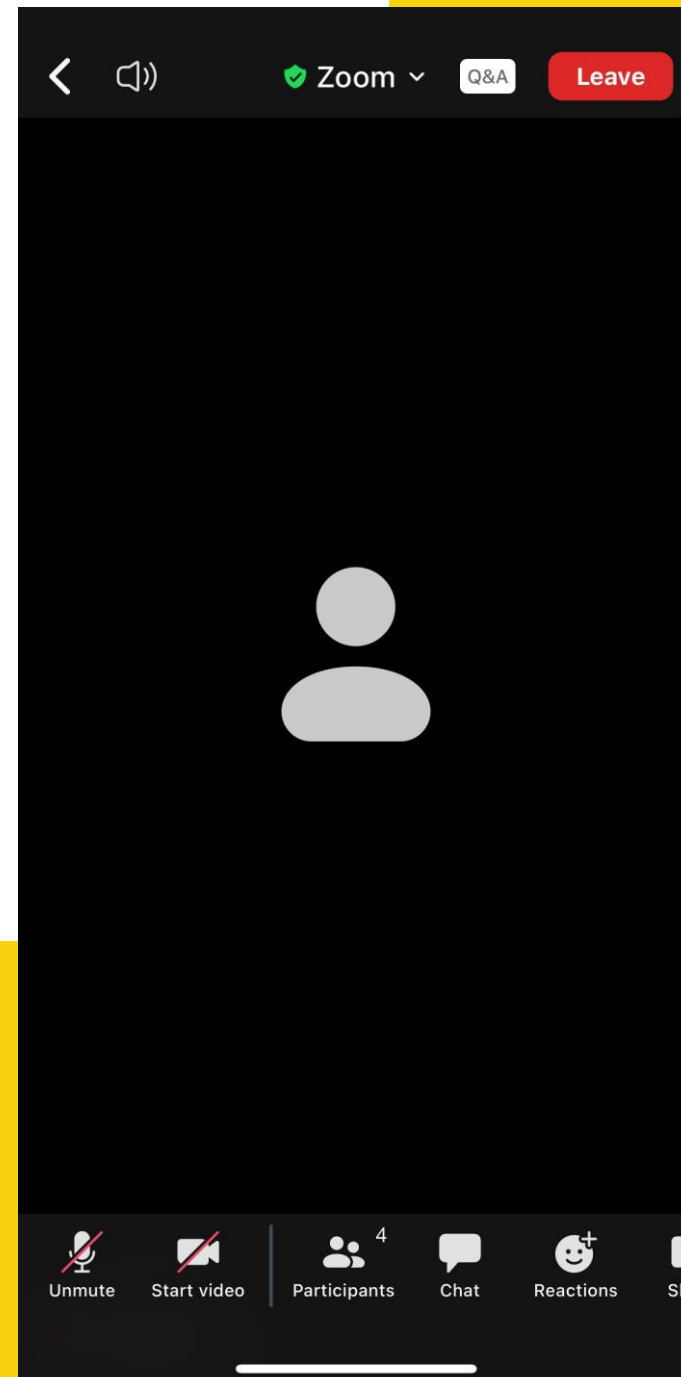
Zoom Q&A

We will have an opportunity for questions at the end of the workshop. You can submit your questions at anytime during the workshop using Zoom's Q&A feature.

- Desktop: Click Q&A in the menu at the bottom of your Zoom screen



- Mobile Device: The Q&A feature may be in the upper right corner of your screen.





ABOUT NATALIE TORRES-HADDAD

- Owner of Financially Savvy Latina, 2 time TEDx speaker on the subject of Financial Literacy, Host of Financially Savvy in 20 minutes Podcast, Award winning Author and best seller, featured in Forbes as a Trailblazer, The Huffington post, LA Times, Fox, CNB and an on-air financial expert and contributor on Univision and Telemundo.
- Holds two degrees in Finance and International Business with a Master's in Public Administration.

Our Money Traumas Unpacked

Your Money Story

Questions for you...

Are you an investor?

What goal do you want to accomplish in a year?

What financial goal do you want to accomplish in 5 years?

Daily or Weekly Journaling

Rituals Savings



What healthy financial habits do you have?

- Organized
- Tracker
- Weekly Check-Ins
- Accountability Partner
- Continuous Educational Courses

Fin Savvy Latina
FSL TRACKER
MONTH OF



INCOME			
DATE	SOURCE	CATEGORY	AMOUNT

BILLS & FIXED EXPENSES		
DATE	SOURCE	AMOUNT

VARIABLE EXPENSES		
DATE	SOURCE	AMOUNT

SUMMARY	
SOURCE	AMOUNT
INCOME	
BILLS & FIXED EXPENSES	
VARIABLE EXPENSES	
BALANCE	

How can we
be more
mindful with
our money?





RUNAWAY
SPENDING

Mindful Top 5 Habits

- Collect receipts
- Categorize expenses
- Speak to household on your monthly goals
- Double check your expenses
- Declutter paperwork/bills



How many of you did cut that

**RUNWAY
SPENDING IN
HALF!**

New Fiscal Year means New Habits can be formed

*Remember...
All it takes is 20 minutes out of your
day to become financially savvy.*

Money Mindful Mindset

Breathing Exercise

**Tips on tracking your
expenses with
receipts and apps.**



Investment Check off list

Will or living trust

☐

Life Insurance

☐

Tax Planning

☐

401K or Roth

☐

Stock investments

☐

Real Estate Investments

☐

Emergency Funds

☐

☐

2022

FinSavvyLatina

Top Six Ways to Stay Organized During Tax Season

1

Use an
Accordion
Folder to File
Tax Documents

2

Keep a
Spreadsheet to
Track Charitable
Donations

3

Label Your
Receipts

Top Six Ways to Stay Organized During Tax Season

4

Scan and
Save Your
Receipts

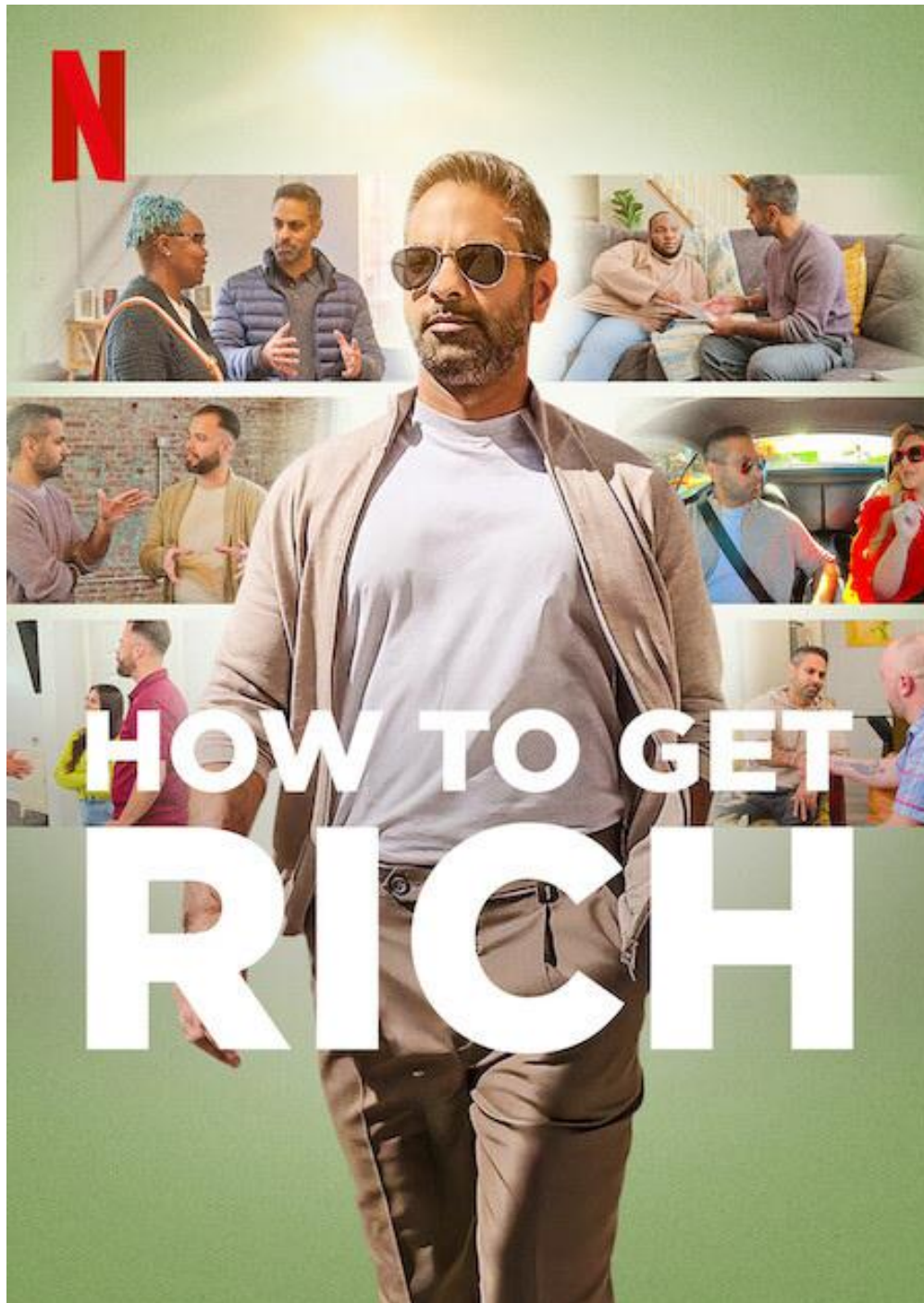
5

Establish a
Secure Place for
All Tax- Related
Documents

6

Shred
Documents You
No Longer Need

FUN FINANCIAL SHOW TO WATCH



FUN & INFORMATIVE

Podcasts

- Financially Savvy in 20 Minutes (Bilingual)
- Stacking Benjamins
- Death Sex and Money
- Rich and Regular