“What Are Your Financial Plans for 2010?”

“New in 2010: Wanted”

“Out With the Old, In With the New”

“Financial Goal Checkup”

“Congratulations”

“Family Issues Summit”

http://tarrant.tamu.edu

Marian Ross, M.S.
County Extension Agent-
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Phone 817-884-1294
To hear your stories of financial success from lessons learned. Three times in 2010, I will be asking for guest stories of how individuals and families have used information from a workshop or the Money 2020 newsletter to manage their finances. The three requests will be themed.

If we have lots of interest, each person who submits an article will be entered into a drawing for a financial management related too, could be for example a savings bond, a home safe, stay tuned.

First call for articles - these are due February 19 either by fax, email or snail mail to my attention: Marian Ross, M.s. - fax (817) 884-1941; email: tbell@ag.tamu.edu; mail: 200 Taylor Street, Suite 500, Fort Worth, TX 76102. (Prefer fax or email)

Theme for April’s issue which is youth Financial Literacy Month:
Youth ~ What I Have Learned About Money
Parent or Adult ~ What I Have Taught the Young Person in My Life About Money
Tips for both:

(Y) How do you manage your allowance?
(A) I started giving an allowance....
(Y) I’m working and now...
(A) I (we) taught the gift of sharing and now...

I hope my fax and email runneth over with articles.

The next theme month is August!! Entries will be due in June...Stay tuned for the theme (however, it might be obvious!!)

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Begin 2010 a little lighter, delete old emails. Shred any ATM receipts, utility bills, receipts for small purchases that are not deductible, any paycheck stubs from 2008 or earlier and any quarterly statement that you receive on accounts that you also receive an annual summary for.

**In With the...**

Set up your 2010 tax files, some useful categories: receipts for medical expenses...gifts and charitable donations...unemployment documents...unreimbursed work/job expenses...investments...home improvements...taxes paid and other deductions.

**Financial Goal Check-up**

As we begin a new decade and year, many folks are reflecting on where to go. I encourage each of you to make an appointment with yourself to review your financial status. For married readers, you need two appointments - one with yourself and then your second one with your spouse. An optional appointment, with your children to review their money spending habits. What to “review” at your appointment, some suggestions:

*Review how managing your expenses went in 2009 - do you need to make changes or did you make changes and reaped benefits from the changes?
*Review your spending plan and savings goal;
*Review family goals. Write a family goal (s);
*Review your net worth statement;
*Review your debt (non-mortgage related)
*Review will;
*Review your credit report or request a copy be sent to you. Pay for your score if you plan on making a home or car purchase.

* Revise or write new financial goals.

Marian Ross received the highest recognition given by Texas AgriLife Extension Service Distinguished Service Award 2009
Family Issues Summit
Thursday, March 4, 2010
Texas Scottish Rite Hospital for Children

9:30-10:00 a.m. Registration

10:00-10:15 a.m. Welcome
Dr. Susan Baillieke, Regional Program Director, Texas AgriLife Extension Service

10:15-11:00 a.m. Keynote: The Answer Is Seven… Plus Or Minus Two (One clock hour)
Sandra L. Mackey, MPAS, PA-C, Director of Staff Wellness, Texas Scottish Rite Hospital for Children

11:00-11:30 a.m. Break

11:30-12:30 p.m. Breakout Session 1 (One clock hour each)
☆ Caregiver TLC
  Dr. Judith Warren, Professor & Special Initiatives Coordinator, Texas AgriLife Extension Service
☆ Why Healthy Eating Is Sometimes Not Enough
  Evelyn Hawkins, LD, SNS, Senior Consultant, Region 10 Education Service Center
☆ Resolving Your Financial Nightmares
  Courtney Nickle, Associate Director, Texas Credit Union Foundation

12:00-12:45 p.m. Lunch

12:45-1:45 p.m. Breakout Session 2 (One clock hour each)
☆ It Wasn’t What You Said… It Was How You Said It
  Sandra L. Mackey, MPAS, PA-C, Director of Staff Wellness, Texas Scottish Rite Hospital for Children
☆ Fitness For Life
  Dr. Erika Nasser, Wellness Coordinator, Quality Improvement Programs, BlueCross BlueShield of Texas
☆ Resolving Your Financial Nightmares
  Courtney Nickle, Associate Director, Texas Credit Union Foundation

1:45-2:15 p.m. Break

2:15-3:15 p.m. What’s For Dinner Tonight?: Quick & Simple Family Meals (One clock hour)

2:40-3:00 p.m. Closing Remarks & Door Prizes

More information or questions?
Contact Marian Ross, M.S.
Texas AgriLife Extension Service
Tarrant County at 817-884-1294
The contents of the Money 2020 Newsletter are for educational purposes only. References to financial products or services do not imply endorsements. Readers are encouraged to consult financial or legal advisors for specific advice.