

# PERSONAL, PROFESSIONAL, AND FINANCIAL DEVELOPMENT WORKSHOPS FOR STAFF AND EMPLOYEES\*

\*The following workshops can be offered to secular and faith-based organizations alike that an organization supports within its customer or community footprint.

## THE BRAND CALLED YOU!

IT'S MORE VALUABLE THAN YOU THINK



Did you know that your future earnings could be impacted – good or bad – by the personal brand you display today? Young people know a lot about brand awareness, what products and services make a statement or fall into obscurity, never to be heard from again. They know what brands are cool (or not), but how many tweens and teens –and even many adults – fully understand the importance of personal branding and the message it communicates? This power-packed activity will assist participants in identifying and creating a personal brand statement that can speak for itself without saying a word.

Duration: 60 to 75 Minutes

Timeframe: Flexible

Audience Size: 15 to 50 Participants

Presentation Needs: Large Whiteboard, Markers, and Eraser

## WHAT DRIVES YOU?

YOUR INTERNAL CATALYST



Do your values drive you, or do you drive your values? What do your values mean to you? Many employees are intimately acquainted with their company's values, and yet, give lip service to their own personal or familial values. A life or legacy in disarray is usually attributable to a lack of clarified values. Why? Because values are the lifeblood behind attitudes, actions, and activities, either intentionally or by default. In this workshop, employees will (re)examine their values, value system, value proposition, value conflicts, and value supporters. Avoid them at your own peril.

Duration: 45 to 60 Minutes Timeframe: Flexible

Audience Size: 15 to 50 Participants

Presentation Needs: Large Whiteboard, Markers, and Eraser

## WHY MOST NEW YEAR'S RESOLUTIONS DON'T WORK!

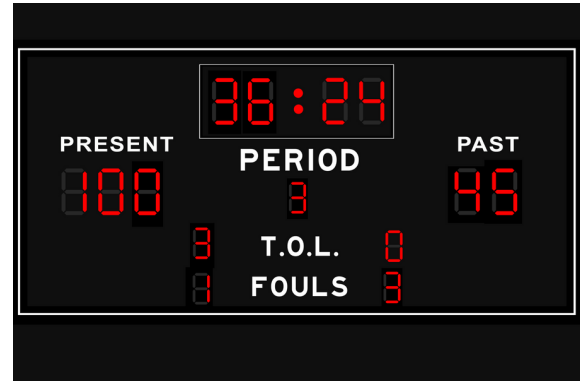


Do you find yourself making New Year's Resolutions that leave you even more frustrated than the previous year? Proceed ahead or give up? is a likely nagging question. How long do you typically try to stay the course, one week, one month, or one year? If your resolution – eating healthy, exercising regularly, or stewarding finances wisely – isn't wrapped inside a lifestyle commitment, then it will eventually be exposed as a facade. In this life-altering presentation, Lawrence will discuss the three-pronged, decision-making approach to accomplishing your most challenging goals.

Duration: 45 to 60 Minutes  
Timeframe: Flexible

Audience Size: 15 to 50 Participants  
Presentation Needs: Large Whiteboard, Markers, and Eraser

## FOUR QUARTER LIFE ASSESSMENT: WHERE DO YOU STAND?



The Four Quarter Life Assessment is a reflective tool for personal, professional, and relational growth. This exercise challenges participants to assess the roles and goals of their connected relationships and shared values. Experiences are inventoried and structured around prioritized objectives for the current season or quarter of life. In sum, this activity will provide participants with a game plan to combat the lingering effects of turnovers and momentum disruptions from previous life quarters. A bad quarter or two doesn't mean you lose. In fact, you and your legacy can still win by making the right momentum plays!

Duration: 60 to 75 Minutes  
Timeframe: Flexible  
Audience Size: 15 to 50 Participants  
Presentation Needs: Large Whiteboard, Markers, and Eraser

## WHAT WERE YOU BORN TO DO, AND WHO BENEFITS?



Life's purpose? This nagging question asks and answers another thought-provoking question, "Why am I here?" It is relatively easy to find, but very few people search for it. This mysterious jigsaw puzzle is embedded in your hardwired genetic code and preprogrammed genius zone. It's not about you; it's about humbly making a difference in the lives and legacies of other people. It is a voluntary pursuit that requires mandatory actions to pull off. Life's purpose can change (but it doesn't have to) at different quarters or seasons of life, although its underlying theme – to equip or to engage or to enhance or to engender or to empower others – often stays the same. It speaks volumes about the efficacy of your unique, leverage-guided value proposition, or what separates you from others based on your talents, gifts, abilities, gravitational pulls, and life experiences. Are you ready to uncover it?

Duration: 60 to 75 Minutes

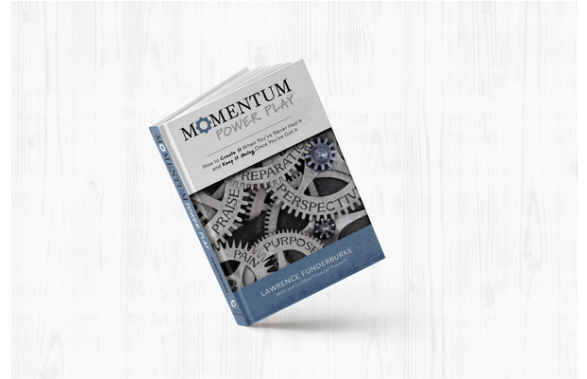
Timeframe: Flexible

Audience Size: 15 to 50 Participants

Presentation Needs: Large Whiteboard

## ***MOMENTUM POWER PLAY***

HOW TO CREATE IT IF YOU'VE NEVER HAD IT  
AND KEEP IT GOING ONCE YOU HAVE IT



Momentum is a term often used in the world of sports. We watch the NCAA tournament, the Super Bowl, or some other major sporting event and we're always amazed when momentum shifts occur. However, rarely do we view it from a life or business application perspective, and we should. Good, bad, or neutral, we come face-to-face with momentum plays, momentum fumbles, or momentum traps daily. They show up in our daily interactions – at school, on the job, and in parenting duties. Momentum without living a life of purpose is a futile endeavor. That's why *Momentum Power Play* was written. To help the hopeless find hope. To motivate the so-called unmotivated whom society has written off. To empower the disempowered who want and deserve a legitimate shot at success in life. To bridge the widening opportunity gaps in our society through mutually beneficial public-private partnerships, but without the tag-along guilt.

For more info on the book, please visit [MomentumPowerPlay.com](http://MomentumPowerPlay.com).

## CULTURE ISN'T EVERYTHING, BUT IT EXPLAINS A LOT OF THINGS



Culture is more than a just a cute buzzword. It means something and explains a lot of things. It speaks volumes about organizational aptitude (or ineptitude), employee attitude, and market share altitude. It's the spark of life inside an organization. It can light the fire for great customer care or client engagement, the litmus test of collaborative competency. It can leverage values, the guiding principles or lifeblood of an organization's pulse. It can ignite ingenuity, the creative force behind (or really, in front of) innovation. It can serve as a stabilizing factor, the kind that's most needed when a crisis or major problem shows up unannounced. And it can drive purpose, the heartbeat or fundamental reason why a business or organization exists. Now, what if culture isn't adequately managed? An organization can offer a stellar service or top-rated product, but if (when?) culture is compromised, then it's just a matter of time before the luster fades and the rust is exposed. Declining or lackluster or non-existent employee morale.

Conflicted and restricted leadership. And suffocating organizational goals, to name just a few. Bad culture takes the oxygen out of a work environment and replaces it with toxic vapors. Culture matters not just sometimes; it matters all the time. Neglect it at your own peril.

Duration: 60 to 75 Minutes

Timeframe: Flexible

Audience Size: 15 to 50 Participants

Presentation Needs: Large

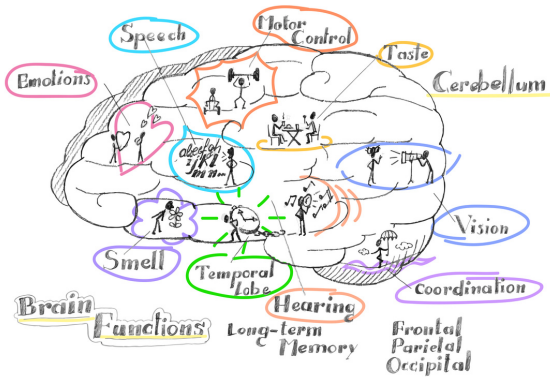
Whiteboard, Markers, and Eraser

## HOW CULTURALLY COMPETENT IS YOUR ORGANIZATION?



Please read the article, [The Historical and Racial Context of Cultural Competency: How Should America Respond?](#)

## UNCOVERING YOUR DOMINANT CEREBRAL LOBE PROFILE



Why do some colleagues mesh beautifully with some associates but can't seem to bond with others? The answer might not have anything to do with positional standing in the company, as measured by job title, salary, or rank. In many instances, employees tend to congregate with like-minded colleagues who often share a common way of thinking, feeling, communicating, or observing. Uncover your cerebral lobe profile and discover the keys to working with associates with vastly different thought patterns, proclivities, and personalities. For more information on our innovative brain development approach, please watch the promo video at [MrFundy.com](http://MrFundy.com).

Duration: 45 to 60 Minutes

Timeframe: Flexible

Audience Size: 15 to 50 Participants

Presentation Needs: Large

Whiteboard, Markers, and Eraser

## WHAT'S YOUR LEADERSHIP STYLE?

DISCOVER, UNCOVER, &



Which end of the leadership vacuum do you want to be? The high-powered side that blows all of the hot air out through force. Yes, some employees need rigid managers or supervisors to keep them focused on a task, but this leadership style offers motivation and no inspiration. The low-pressure side of the vacuum draws things in. This type of leadership pulls people in voluntarily. Inspirational leaders help employees make a heart change, not just a head change. And there is still one more leadership style at play. Just like a top-notch vacuum with many beneficial accessories, a transformational leader equips the end user with various tools to turn a messy situation, difficult problem, or out-of-control life into something beautiful. Very few leaders reach this level, but it is available to all.

Duration: 60 to 75 Minutes Timeframe: Flexible

Audience Size: 15 to 50 Participants

Presentation Needs: Large Whiteboard, Markers, and Eraser



## HOW TO WORK WITH (AND HELP) DIFFICULT PEOPLE



You've probably heard the expression, "Hurting people, hurt other people." Check this out: Difficult people are difficult to other people. Why? Complicated lives complicate the lives of others. They can't help it. Some are narcissists. Some are perfectionists. And still others are perpetual antagonists. They create tension when none exists. They undermine trust when distrust was never an issue. They disempower others, who under normal circumstances, usually feel empowered. At the heart of the matter is personal brokenness, a deep-rooted condition that drives their pain as well as the pain they intentionally or unavoidably inflict on others. Lawrence's remedy for personal brokenness is pretty straightforward: Excavate in order to rehabilitate. His insights are sure to challenge conventional wisdom.

Duration: 45 to 60 Minutes  
 Timeframe: Flexible  
 Audience Size: 15 to 50 Participants  
 Presentation Needs: Large Whiteboard

## DEALING WITH CHANGE: HOW DO YOU AND YOUR ORGANIZATION MEASURE UP?



Some people embrace change while others resist it at every turn. Some organizations are quick to change when the situation warrants it while others are reluctant to steer the ship in a different direction. Change is not only hard, but it can be agonizingly brutal to deal with because the future is unknown. Simply put, the process of change and its resulting outcomes, along with corresponding demands, can't be reasonably predicted, only assumed. The fear of the unknown is often more paralyzing than the reality of adversity. The instinctive, emotional side of the brain is quick to identify a myriad of shortcuts and negative outcomes that could (but aren't likely) to arise. These error-laden snapshots and bad-ending movie reels are what stop most people and organizations in their tracks. You must become an agent of change first before you have the privilege of being a change agent.

Duration: 45 to 60 Minutes  
 Timeframe: Flexible  
 Audience Size: 15 to 50 Participants  
 Presentation Needs: Large Whiteboard

## FINANCIAL DEVELOPMENT

Employees need more than just paychecks (or an occasional bonus), health benefits, and matching retirement contributions. They need a working financial plan. Most of them are in desperate need of information to manage the day-to-day affairs of their financial lives, to say nothing about saving for big-ticket purchases or household repairs, college planning for kids, protecting income and cherished assets, and navigating the complex landscape of estate planning. Here are five reasons why Americans resist or struggle with financial wellness:

1. Lack of Knowledge

- In the world of personal or family finances, the accumulation of information and the application of knowledge are critical. In general, fiscal aptitude isn't on the radar screen of most America but it should be.

2. Lack of Familiarity

- Financial wellness is attainable, but the journey ahead isn't for the faint at heart. In fact, new GPS coordinates will have to be plugged in to reach an unfamiliar (but incredibly rewarding) destination.

3. Lack of Confidence

- The learning curve to boost financial knowledge can be very steep and deflating for most Americans, thus, the goal is never pursued.

4. Lack of Accountability

- Financial mentors – advisors and planners and stewardship coaches – can serve as much-needed guides. However, most people can't afford or don't want to pay for their advice.

5. Lack of Patience

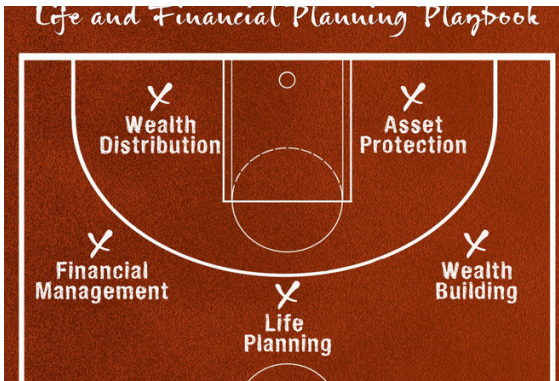
- Financial wellness takes time, but most Americans are too impatient or too distracted to let the process run its course. Bad financial habits can take months, or even years, to correct.

Lawrence's holistic approach to financial wellness provides employees with a working game plan to reduce stress, boost financial IQ, improve cash flow, protect both sides of the balance sheet, and create a value-driven road map and winning legacy template. This is achieved by offering inspirational presentations, cutting-edge empowerment learning modules, practical tips and effective strategies, and follow-up classes.

### *Macro Approach*

Methodology: Through his gripping childhood story, Lawrence makes a heart-to-heart connection with the audience, then he pivots to the heart of the matter – providing listeners with the information and impetus to make a heartfelt change in their finances, behavior patterns, or stewardship commitment. (The macro approach is a perfect segue or motivational bridge to transition participants to the next leg of the financial wellness journey: targeted learning as outlined in the micro approach.)

## MR. FUNDY'S LIFE AND FINANCIAL PLANNING PLAYBOOK



In this fast-paced and interactive presentation, Lawrence will highlight the five key areas of life and financial planning and how they correspond to the five positions on a basketball court: Life Planning (point guard), Financial Management (shooting guard), Wealth Accumulation (small forward), Income and Asset Protection (power forward), and Estate Planning (center). Only general financial planning information will be shared, for example, rules of thumb averages and metrics, terms, and economic concepts.

Duration: 75 to 90 Minutes

Timeframe: Flexible

Audience Size: 15 to 75 Participants

Presentation Needs: Large Whiteboard, Markers, and Eraser

## INVESTING 101 – STOCK MARKET BASICS



Did you know that the stock market has historically averaged a 10 percent return every year for many decades? Using the Rule of 72 or how long it takes to double your money, a dollar invested in the stock market will typically double in value every 7.2 years. Of course, the stock market doesn't offer investors any guarantees. However, participants will learn in the heart-pounding Investing 101: Stock Market Basics game how to improve their chances of selecting winning company stocks. And some stocks pay investors quarterly dividends or income every three months whether the underlying stock goes up or down. Now that's a sweet deal worth the potential investment!

Duration: 60 to 75 Minutes

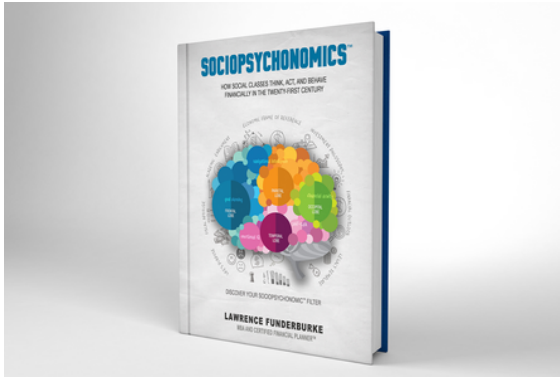
Timeframe: Flexible

Audience Size: 15 to 30 Participants

Presentation Needs: Large Whiteboard, Markers, and Eraser



## DISCOVERING YOUR SOCIOPSYCHONOMIC FILTER



Are there distinct differences in how social classes think, act, and behave around financial matters? Without a doubt. Your upbringing and life experiences growing up — as well as your cerebral lobe profile — have likely shaped and influenced your worldview around economic matters. In this workshop, Lawrence's candid and, at times, humorous insights will help participants discover their Sociopsychonomic filter. Bad financial habits and self-sabotaging emotions around money can be broken with an upgraded mindset and newfound frame of reference. *Sociopsychonomics* reflects who we are at the core, but provides practical tips and tools to fine-tune our monetary filter. Are you ready for your financial makeover?

Duration: 60 to 75 Minutes

Timeframe: Flexible

Audience Size: 15 to 100 Participants

Presentation Needs: Large Whiteboard, Markers, and Erasers

## FINANCIAL SCRIPTS: HOW WILL YOUR STORY UNFOLD?



In this power-packed presentation, inherent biases, blind spots, and bypass routes are highlighted. These phenomena can wreak havoc on an individual's, family's, or organization's economic well-being when left unchecked. How so? Biases compel us to keep a death grip on preconceived notions, but what if they're based on faulty conclusions or missing information? Blind spots prevent us from seeing what needs to be seen and dealt with ASAP. We can see the hazard signs, roadblocks, and pitfalls in our rearview mirrors, but we don't take them seriously until something inevitably goes wrong. Bypass routes are unverified shortcuts that we are prone to take based purely on convenience, comfort, or causality (or what attracts us to get-rich-quick schemes). But what's convenient, comfortable, and causative in the financial realm rarely pays off as expected.

Duration: 60 to 75 Minutes

Timeframe: Flexible

Audience Size: 15 to Participants

Presentation Needs: Large Whiteboard