



YOUR FINANCES: STAYING ENGAGED AND EDUCATED

As we move into the second half of the year, alongside reviewing your finances, a review of your financial knowledge becomes essential. Strengthening your understanding can lead to more informed and confident decisions. See how you can educate yourself to make empowered financial decisions for the remainder of the year!

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1. Seek out Educational Seminars

Seminars hosted by advisors can be a great place to start when trying to learn more about your finances. However, it's important to note that not all events hosted by financial advisors are held for educational purposes. To make sure you're getting an educational opportunity, not a sales pitch, try seeking out educational events or workshops specifically opposed to product events. Educational events are more geared towards giving back to the community they're hosted in and helping that community make better-informed decisions.

2. Double Check Social Media

Social media, especially apps like TikTok or Instagram, offer short video content that can be highly engaging and easily digestible, making it ideal for quick consumption and sharing among users. While this easy to consume content can be enticing, remember to exercise caution with financial advice given on these platforms. While it can provide a good starting point, the information on that platform should be double checked by determining the quality of the advice or even the credentials of the person giving it.

[Brokercheck.org](https://www.brokercheck.org) is a good resource to see if someone is a credentialed financial advisor or not.



3. Do Your Research

Piggy backing off the last point, use social media to ignite curiosity about financial topics, but don't stop there. Keep yourself curious about these matters and dive deeper into topics of interest with reliable sources. Seek out blogs, podcasts, magazines, and whitepapers from credited sources to corroborate and go more in depth on what you learned from a short Instagram reel or TikTok.

Here are some magazines to consider reading and/or subscribing to in order to stay up to date with financial topics:

- [Money](#)
- [Kiplinger](#)
- [MoneyWeek](#)
- [MoneySense](#)
- [SmartMoney](#)
- [Wall Street Journal](#)

4. Look at Alternative Views

Before making any financial decisions, you'll want to make sure you seek diverse perspectives. It's important to remain adaptable and open-minded to differing viewpoints. This way you can stay informed and react less emotionally and more intelligently to financial changes. By challenging your opinions, you can adequately weigh the pros and cons, and potentially see gaps in your knowledge that you weren't aware of before.

5. Seek Guidance

Consider working with a financial advisor who can tailor financial education to your specific needs and interests. This will allow you to take all the research you have done to someone who can offer even more resources and guidance to help you make informed decisions. Additionally, consider seeking an advisor who hosts their own events and can incorporate your feedback into their seminars.



If you're interested in educating yourself about the financial industry, or if you're looking for a second opinion on your current strategy, remember, we are here to help with the complexities of financial planning while keeping your financial goals in focus.

Contact Andy Merchant at PCIA Wichita at (316) 669-9413 or amerchant@primefinancial.com, and Jason Noble at PCIA Charleston at (843) 743-2926 or jnoble@primefinancial.com.

Learn more about staying financially engaged through education by clicking [here](#) to listen to Jason Noble and Andy Merchant discuss this topic on the latest episode of their podcast, "[20 Minutes of Clarity](#)."