

BUSINESS & FINANCE

GRANT WRITING FOR EFFECTIVE NON-PROFIT FUNDRAISING

This course introduces you to best practices for foundation grant writing. Each of you will write a grant application, including need statement, goals, step-by-step action plan, assessment, and budget documents. You will learn to write clearly and with impact. Appropriate for non-profit professionals and students.

DCB 2287 T 2/18-3/24 2:30-5:30pm KSU \$399
 Note: T 2/25 noon-6pm

For 30 years, instructor **Margot Becker** has successfully raised funds for non-profit organizations dedicated to the environment, social justice, social service provision, mental health, the arts, and education, both in the US and internationally.



BOOKKEEPING SERIES

Designed for students who want to achieve an entry-level position as a bookkeeper. A certificate of completions will be mailed at the end of the program to students who successfully complete all three courses and meet attendance requirements.

Instructor: D. Boice, MBA is an instructor of accounting and business at SUNY Ulster and SUNY New Paltz. He has worked in the fields of accounting, finance and operations as well as 35 years as a tax preparer.

BASIC BOOKKEEPING

The course covers the proper recording of business transactions, the principles of double-entry bookkeeping, bank reconciliations, journals and ledgers, the preparation of trial balances, financial reports, and other basic accounting principles.

DCB 1216 T 2/18-3/3 6-9pm KSU \$99

BOOKKEEPING THE EASY WAY WITH QUICKBOOKS

This powerful software package enables users to do invoicing, write checks, reconcile bank accounts, and help manage accounts receivable and payable. The class emphasizes accounting principles, new company setup, bookkeeping procedures, manipulation of data files, and report generation for financial management. Prerequisite: Intro to Windows and a general understanding of accounting theory and bookkeeping procedures. Fee includes textbook.

DCM 1646 T 3/17-4/7 6-9pm KSU \$199

INTRODUCTION TO EXCEL

This Excel class will include entering data into a worksheet; navigating a worksheet; creating workbooks; inserting columns, rows, and worksheets; creating formulas and functions and basic formatting techniques.

DCM 1601 T 4/14 & 4/21 6-9pm KSU \$59

NOTARY PUBLIC WORKSHOP

This class, endorsed by the American Society of Notaries, prepares students to pass the New York State notary exam and provides a comprehensive view of the notary public office.

Instructor: E. Haddeland, Esq., is a licensed attorney and notary public in New York State.

DCB 1260 R 3/12 3:30-6:30pm KSU \$69



FINANCIAL MANAGEMENT*

Research has shown that the vast majority of millionaires are fastidious planners, budgeters, and investors. We want to show you how to develop a sound financial strategy - one that covers all the financial bases, from insurance to investing to estate conservation.

DCB 2014 W 4/1 6:15-8pm KSU \$35

MAKING THE MOST OF SOCIAL SECURITY*

About 40% of retirees apply for Social Security at age 62. But by doing so, they may significantly and permanently reduce the benefits that receive over a lifetime. Social Security provides a guaranteed income stream and longevity protection, spousal protection, and some inflation protection.

DCB 1751 T 4/7 6:15-8pm KSU \$35

ESTATE CONSERVATION: HELP PROTECT YOUR ESTATE ASSETS & AVOID UNINTENDED CONSEQUENCES*

You may hope to leave a substantial legacy for your loved ones and charitable causes. But without proper planning and the appropriate financial strategies, you may not be able to protect your assets from probate and other unintended consequences. As a result, your estate may be settled in ways you did not intend.

DCB 2215 W 4/8 6:15-8pm KSU \$35

***TAKE ALL 3 CLASSES & SAVE \$30!**

FINANCIAL BUNDLE

DCB 2038 W 4/1, T 4/7 & W 4/8 6:15-8pm KSU \$75

FINANCIAL ROCK STAR!

Planancial's online course is a one-stop-shop for top-notch personal finance strategies, personal stories and professional tips in easy to understand empowering videos. It covers budgeting, emergency funds, life insurance, saving for retirement, student loans, buying a first home, and understand the basics of estate planning. You receive 7-minute videos for 7 days paired with an easy-to-understand workbook reinforcing the key points and strategies.

Sign up on www.planancial.com

Barbara Ginty owner of Independent Financial Services, a family business for over 20 years specializing in comprehensive financial planning. She is a CFP® professional and holds both security and insurance licenses including the following: series 7, 63, 65 and health, life, and disability insurance.