



Financial Wellness Spotlight

July 2021



Learning Resources for Your Financial Wellness

BMI Federal Credit Union promotes financial wellness through free and accessible financial education. We are ready to meet your needs on-line or in-person.

Online Learning Resources

Learn about the financial topics you want at a time that is convenient for you through our [Online Learning Center](#). Included you will find the following resources:

- **Financial Education Playlists:** Choose from our list of topics - Money Basics, Credit & Borrowing, Budgeting & Saving, Home Ownership, Higher Education, Planning for Your Financial Future, and Financial Care-Giving. Each playlist includes self-guided learning modules that are mobile friendly.
- **Video Series:** Our collection of 12 videos makes concepts like managing debt or understanding your credit score easy to grasp. Each video is between 2 - 4 minutes in length and tackles complex financial topics in an entertaining way.
- **Online Learning Dashboard:** Use this tool and search for financial topics you want to learn more about. You will find in-depth articles, calculators, and coaches to help build your knowledge and succeed in reaching your financial goals.

Free Community Workshop Series - Now Online and In-person

Our workshops are designed to help improve your financial life. Starting in September, we are excited to offer some workshops in-person as well as virtually.

Visit bmifcu.org/calendar to view the schedule, location, and register to attend a workshop.

Upcoming Workshops:

Smart Money: Ten Fundamentals

Wednesday, August 25, 2021 - Presented Virtually

Learn where you stand on ten measures of financial fitness. Get tips on how to make a workable plan to improve your financial situation and achieve your specific money goals.

New Youth Workshop! Banking on Your Own

Saturday, August 28, 2021 - Presented Virtually

This webinar is for teens and young adults. Learn the steps you need to take to build good

money skills. It starts with opening your first account and building good financial habits. We will cover everything from Savings Accounts, Checking Accounts, to why and how to build credit.

Home Buying with a Mortgage Specialist

Saturday, September 11, 2021 - Presented In-Person and Virtually

Learn how to prepare for purchasing a home and understand the responsibilities that come with home ownership. A mortgage specialist will share tips on how to improve the process, from the dream to closing.

Smart Money: Becoming a Saver

Thursday, September 30, 2021 - Presented Virtually

Master the mindset, methods, and motivation needed to develop the habit of saving and reach your financial goals.

Smart Money: Understand and Improve Your Credit Score

Tuesday, October 5, 2021 - Presented Virtually

Gain a better understanding of why your credit score matters, how it works, and the steps you can take to improve your score.

Home Buying with our Panel of Experts

Saturday, October 9, 2021 - Presented In-Person and Virtually

Thinking about buying a home? Learn about mortgages, realtors, insurance and more from our panel of experts.

Estate Planning 101

Saturday, October 16, 2021 - Presented In-Person and Virtually

Learn about the documents all adults should have in place to ensure their wishes are clear and estate secure.

Medicare for Beginners

Wednesday, October 20, 2021 - Presented Virtually

If you are new to Medicare or if you need help understanding your options, "Medicare for Beginners" is a valuable resource for unbiased information to help you make informed decisions. Presented by the Central Ohio Area Agency on Aging.

Health Savings Accounts

Wednesday, October 27, 2021 - Presented Virtually

Learn how Health Savings Accounts (HSA) work and how you can save money on qualified medical expenses when enrolled in a High Deductible Health Plan (HDHP). Understand the benefits of a Health Savings Account offered by BMI FCU.

Asset Protection Planning

Saturday, November 13, 2021 - Presented In-Person and Virtually

How probate, taxes and long-term care costs can affect your estate and steps you can take to protect it.

Smart Money: Managing Debt

Saturday, December 11, 2021 - Presented In-Person and Virtually

Your debt is unique to you and your circumstances. Understand your options for managing and minimizing your debt.

[View the schedule and register to attend a workshop.](#)

Great Products and Services



Earn a \$200 Cash Bonus¹ with a Home Equity Line of Credit.

Put your home's equity to work for you with a Home Equity Line of Credit. A Home Equity Line of Credit, or HELOC, offers you a flexible Line of Credit for a variety of needs by using the equity on your home. Right now, you could earn a \$200 cash bonus when you open a HELOC from BMI Federal Credit Union.

¹See complete details.



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There's never a convenient time to lose control of your card. Card Alerts with MyCardRules gives you control over how, where, and when your card is used. Stay in control of your card with these great features.

⁺Card Alerts are provided at no additional cost from BMI FCU. Message and Data rates may apply.



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Refinance any titled vehicle, earn a \$400 cash bonus, and drive happy! Get affordable financing, no application fees, and competitive low rates. ⁺[See complete details.](#)

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