



DEBRAOHSTROM.COM

Debra Ohstrom, CFA

Financial Educator | Speaker | Founder

Corporate Finance Training for Employees



TALKS/PRESENTATIONS

Educational Financial Training for Employees



- Can be focused around employee 401k plan if needed
- Virtual Training is recorded for future employees
- Walk Employees through setting Money Goals
- Learning to understand Risk and Investment Groups
- The difference between day trading and long term investing
- Understanding Mutual Funds and ETF's
- Combining investments in a way that is right for an employee's goals and situation

In-Person or Virtual includes



- Handouts and Guides for reference

ABOUT ME

Years of Experience

Debra Ohstrom, CFA, has spent over 27 years in the Financial industry at firms such as Allianz Global Investors, Merrill Lynch, Morgan Stanley and Citi Private Bank. She has an MBA in Finance and the Chartered Financial Analyst designation.

[Plan and Invest Workbook on Amazon.com](#)

www.DebraOhstrom.com

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WHAT CLIENTS AND STUDENTS ARE SAYING

BIZ LIBRARY

"I'm very excited to add your expertise to our Expert Insights series! This course was so helpful for me personally to learn as we shot, so I can't wait for our learners to gain this valuable information, too!" -

Director of Content

Jacqui C. - Student

"No one's explained finance and investing to me this way before. Debra makes it so easy to understand."



"Your event was so educational and informative in such an approachable way!"

- Megan Lund, Event Curator



Your Partner in Financial Education

Companies hire Debra Ohstrom, MBA, CFA to help educate employees on finance and investing topics. This increases participation in 401k and other retirement plans as well as encouraging employees to set money goals and build a financial plan.

83% of people who create a financial plan feel better about their financial situation within 12 months and that is regardless of their income level.