



The Simple Road Toward Financial Freedom

Speaker Sheet for Employers, Universities & Event Planners

INSPIRE CONFIDENCE | REDUCE STRESS | IMPROVE FOCUS

SimpleRoadBook.com

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Why Book Us?

Engaging, insightful, and fun – our high-energy financial talks, based on our #1 **bestselling book**, equip employees and students with real-world money skills that strengthen both individual confidence and organizational results.

EXCLUSIVE FRAMEWORKS FROM THE SIMPLE ROAD

- **50/20/30 Save-First Model™**
Save first, then live on the rest.
- **20-to-\$1M Method™**
A clear path to millionaire status in about 20 years.
- **STL Moments™**
Stop, Talk, Listen – avoid costly mistakes.
- **Unlocking Free Money**
Maximize match, HSA, and long-term growth.



ABOUT THE SPEAKERS

- **Mark Schlipman** – Financial advisor with 25+ years helping individuals and businesses build wealth and independence.
- **Steve Short** – Corporate executive who led multibillion-dollar divisions, now simplifying financial concepts for real-world results.

A portion of proceeds supports scholarships for young cancer survivors through Cancer for College.

Presentation Overview:

- 25-min keynote packed with insights
- 25-min interactive Q&A
- Book signing (if requested)

DID YOU KNOW?

- 66% of employees are financially stressed; nearly half lose 3+ **work hours** per week on finances (*Bank of America, Morgan Stanley*)
- Employees under financial stress are 2x more likely to be job-hunting (*PwC*)



WHAT THIS DELIVERS

For Employees:

- A durable hardcover leave-behind they'll revisit at every life stage – not a handout to forget.
- Zero sales pitches – just education.

For Employers:

- Retention & focus: less stress, more engagement – not hours lost to money worries.
- Benefits utilization: employees use match, HSA, autosave – not leaving free money unused.

FEEDBACK FROM ATTENDEES

- *"A simple, easy to digest roadmap on how to be in the driver seat with your finances."*
- *"Loved the 50/20/30 rule. Will start implementing that in my budget!"*
- *"Thank you for making financial concepts easy to understand. I also appreciate that you did not try to sell me a financial product."*

Illustrative ROI:

If 50 employees each reclaim 30 minutes per week:

- 25 hours recovered weekly
- At \$40/hour loaded cost, that's \$1,000 per week
- A \$3,000 session pays for itself in <1 month

Small Groups
(up to 50 attendees)

Includes 5 books and 20% discount on add'l books

Medium Groups
(51-250 attendees)

Includes 25 books and 25% discount on add'l books

Large Groups
(251-1,000 attendees)

Includes 100 books and 30% discount on add'l books

Very Large Groups
(1,001+ attendees)

Custom

Follow-Up Option:
30-minute virtual Q&A session
\$500

\$3,000

\$5,000

\$7,000

Let's Talk!