

Financially Smart Aliyah

If you plan it, you can live the dream

Rifka Lebowitz

Financial Consultant

 “Living Financially Smarter in Israel”

www.rifkalebowitz.com



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Budgeting

*“Beware of little expenses:
A small leak will sink a great ship.”*

- Benjamin Franklin

Budgeting

HEALTHY



VS.

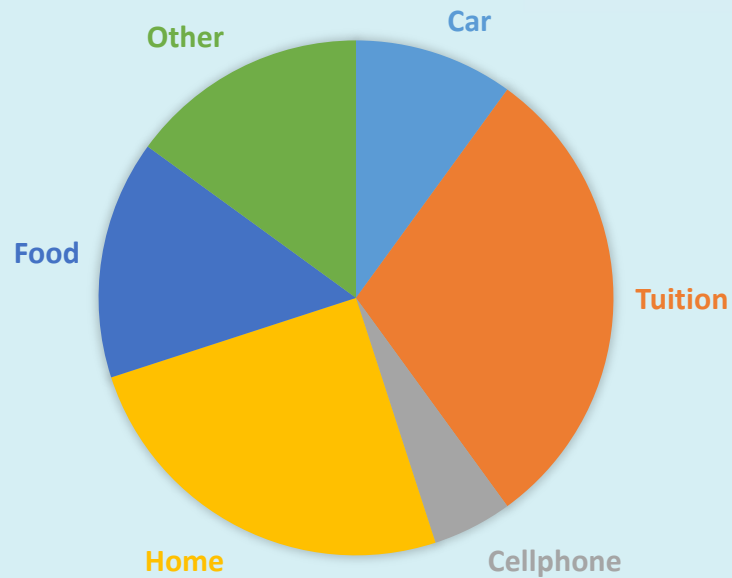
INDULGENT



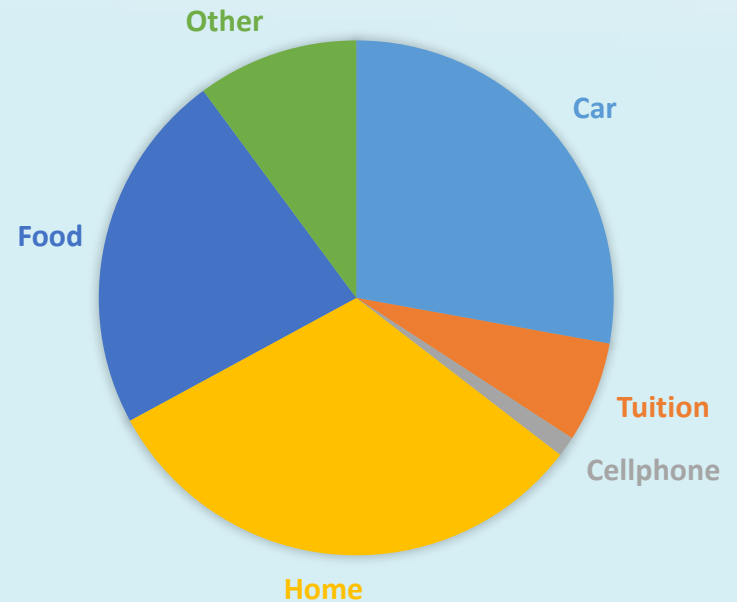
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Budgeting

PRE ALIYAH



ISRAEL



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Planning

“It takes as much energy to wish as it does to plan”

- Eleanor Roosevelt

Planning

- Pre Aliyah
- 0-12 months after Aliyah
- 1+ years after Aliyah




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Planning

Pre Aliyah

- Access your money
- Checks and Credit Cards
- POA, Will, Life insurance



ALIYAH FAIR

EDUCATION RETIREMENT ALIYAH BENEFITS

EMPLOYMENT COMMUNITIES FINANCES

WORKING IN PARTNERSHIP TO BUILD A STRONGER ISRAEL THROUGH ALIYAH

Nefesh **ב'נפש**
Aliyah: Live the Dream

הסוכנות היהודית
THE JEWISH AGENCY
FOR ISRAEL **אג'י**

Ministry of Aliyah and Immigrant Absorption

משרד עלייה
מגוייר

JEWISH NATIONAL FUND
Your Voice in Israel

The banner features a collage of photos showing diverse groups of people, including families, young adults, and individuals, engaged in various activities and settings, representing the community and support for aliyah.

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Planning

0 – 12 months after Aliyah

- Survival mode

1+ years after Aliyah

- Sustainability and stability
- Set a goal date – by which time your financial life will be back on track.



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Banking

“A banker is a fellow who lends his umbrella when the sun is shining and wants it back the minute it begins to rain.”

- Mark Twain



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Banking

Privilege

vs.

Product



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Thank you

 “Living Financially Smarter in Israel”

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