



Personal Finance- Setting Realistic Goals

COURSE CONTENT

The "5E" of Personal Finance: Rationale and Approach

1. Establish factors affecting income throughout life;
 2. Evolve practices for successful money management;
 3. Evaluate risks, costs and benefits of financial decisions;
 4. Explore opportunities available for saving and investing;
 5. Empower self with skills to continually value-add finance.
1. Identify factors affecting income throughout life
 2. Evolve practices for successful money management
3. Evaluate risks, costs and benefits of financial decisions.
4. Explore opportunities available for earning, saving, spending, investing, multiplying
5. Upgrade skills as an integral part of the personal finance plan

Target Participants ;

Managers, Sales Professionals, Business Owners, Team Leaders, Property Developers and Leaders, Self Employed, Financial Consultants and Manufacturers.

FACILITATOR: Mr. Abu

He is a SEBI Registered Investment Adviser (RiA) (Licence No -INA200000910) having 12+ years of experience in multiple verticals of financial markets. His Masters in Psychology and Certification in Financial Planning (CFP) gives him a clear edge in understanding investor traits and give customized solutions in Personal Financial matters.

He regularly appears in leading regional media like Puthiya Thalaimurai, Sun News, Nanayam Vikatan on matters regarding Personal Finance and Investments. He is the founder CEO of Wealth Traits Financial planners which focuses on Doctors and Single Parents.

He is most sought after person for conducting workshops on personal financial matters across institutions and corporates. He takes guest lectures and session for BSE & NSE. Corporates like LIC, SBI Life, Shriram Chits, (Bank of) Baroda Pioneer Mutual fund, IDBI Bank engages him frequently.

DETAILED PEDAGOGIC SCHEMA

Topics (a) through (j) cover the 5W / 2H of personal finance, as below:

- 1) various systems emerged in line with evolving currency in its present form
- 2) the conventional monetary economics that lie dormant in our cultural practices
- 3) approaches to savings that serve and save individual, national and global interests
- 4) money, linking the multi-lingual, multi-cultural, multi-religious, multi-national society
- 5) money as the cause & effect, source & destination, factor & root, driving demand & supply the road to financial success :: EARN, SAVE, SPEND, INVEST, GROW
- 6) where (f) (venues and avenues)
- 7) how, who (g) (strategies, actions)
- 8) what (h) (metrics, measures)
- 9) how much (i) (ratios, proportions)
- 10) why, when (j) (analyses, decisions)



TRAINING PROGRAMME FEE :

Rs. 3,500/-per participant + 18% GST.

GSTIN : 33AFKPG7543M1Z5 SAC CODE : 999293 (Commercial Training and Coaching Services)

It covers Course Material, Buffet vegetarian lunch & refreshment. Cheque / DD drawn in favour of "Maxwell Centre for Industrial Training and Development".

Registration Terms & Conditions:

- Clients, who are nominating 2 or more than 2 participants, will avail 10% discount on the total cost.
- Cancellations are subject to a service charge. Substitutions are acceptable. Maxwell Academy Private Limited has the right to cancel a workshop if the attendance does not meet the 7 person minimum. In this instance, all payments will be fully refunded.
- Please contact us at 9841985110 if you have a group of 10 or more. Customized training may be proposed.
- Training Venue are subject to change based on the number of participants

Date and Time:

20th December 2018

Thursday

10 am - 5 pm



Venue:

The Fern Citadel Hotel

Bangalore

Karnataka 560009

Maxwell Centre For Industrial Training & Development

New no.12, Old no. 35, V.P. Akilan Street, M.G.R. Nagar, Chennai-78.

Phone: 044-4261 6430 | 044-4203 3075

E-mail: clarapoulin@maxwellacademy.com

Website: www.maxwellacademy.com

Connect with Us on Social Media

