



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. Yogendra

DOMAIN EXPERTISE (8+ Years of Experience)

Generate Investment Ideas and Strategies, Equity Research and Analysis, Financial Modelling, Discounted Cash Flow, Sum of the Parts, Relative Valuation, Company & Industry analysis, Peer Benchmarking, Merger & Acquisition analysis, Micro/Macro-Economic analysis, Credit Research and Analysis, Fixed Income Portfolio Analysis

Worked with various Investment Banking, Fund Management and Corporate Finance clients to provide investment advice, research and analysis, portfolio management, and risk analysis support

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

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)



Date and Time:

22nd December 2018

Saturday

10 am - 5 pm



Venue:

Hotel Srinanak Continental,

New Delhi

Delhi 110005

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