PERSONAL FINANCE

The main reason people struggle financially is because they spent years in school but learned nothing about money. The result is that people learn to work for money…, but never learn to have money work for them.
Robert T. Kiyosaki, Author of Rich Dad Poor Dad

COURSE INFORMATION

The purpose of the Personal Finance for Professionals course is to expose professional employees to essential personal financial skills in order for them to achieve financial independence.

COURSE CONTENT

This unique one-day program will teach you about:

FINANCIAL INDEPENDENCE

- What does financial independence mean?
- What is the impact of inflation on financial independence?

RETIREMENT PLANNING

- Provide insights why we need to do retirement planning
- What are the different phases in retirement planning?
- What financial products can be used in each phase of retirement planning?
- Explain the tax deductibility of contributions and taxation on lump sums
- A practical approach to determine what I need to invest to ensure I am providing enough for my retirement needs

FORMULATION OF YOUR OWN WEALTH CREATION PLAN

- Practical steps towards financial independence

PROTECTING YOUR WEALTH

- The importance of risk protection, the types of life insurance risk products, and do I have sufficient cover to protect me and my family's needs?
- The importance of a will
- The importance of estate planning

"A life-changing event in terms of personal money matters. Great exposure to investment methodologies and strategies. Many thanks for sharing your own personal learnings and experiences"

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