



# Financial Wellbeing

Month

July 2015, Mumbai

In association with



**Max Secure  
Financial Planners**

# Information Packet



Peace & Prosperity with Money

## What is Financial Wellbeing

Financial Wellbeing is that state of being wherein a person is making the most efficient use of financial resources, is in a position to absorb any financial shocks, is on track for meeting current & future financial goals, and has a feeling of peace & satisfaction about financial life. Financial Wellbeing can be achieved by any individual / family irrespective of their income level or wealth level.

## What is Financial Wellbeing Month

Financial Wellbeing Month is a joint initiative of Professional Financial Advisors, Financial Services Industry & Network FP (Financial Planners Network of India) to organize a series of 100+ Financial Wellbeing Camps in July 2015 reaching out to 3000 + Consumers.

## What is a Financial Wellbeing Camp

During the FW Month, we will aim to reach out to consumers by organizing Financial Wellbeing Camps in the Mumbai region. Each camp will attempt to educate the participants on achieving financial wellbeing, help them get started with basic tasks to manage their personal finances better, guide them towards long term wealth creation and fulfilment of life's financial goals & dreams.

## Who can Host Financial Wellbeing Camps

Financial Wellbeing Camps can be organized for stakeholders of the following types of organizations;

- Companies & Corporates for their employees
- Clubs, NGOs & Associations for their members
- Housing Societies for their residents
- Small Businesses for their clients
- Educational Institutes for their final year students

## Audience Size of Camps

Audience Size can range anywhere from 15 to 100 participants. However the ideal audience size for a real impactful session is 30-50 participants. We can consider organizing camps for 100 + participants based on availability of resources and trainers.

## Venue for hosting the Camps

Financial Wellbeing Camps are usually organized at the in-house training centres / conference halls of a company or meeting halls / community halls of the clubs / associations / housing societies.

If the organization does not have any hall for the hosting the camp, Network FP on a special request & based on availability of resources will try to arrange an economical venue at a nearby place.

## Experts / Trainers at the Camps

Network FP has empaneled Personal Finance Experts as trainers / speakers of the campaign who meet the following eligibility criteria\*:

- **Qualification:** CFP / CFA / CA / CWM / MBA / PG / NISM L1+L2
- **Experience:** 5 + Years as a Personal Finance Professional
- **Licenses:** SEBI Registered Advisor or AMFI Registered Advisor
- **Declaration:** Commitment to Ethical Practices before, during & after the Financial Wellbeing Camps as listed by Network FP

Apart from the above Personal Finance Experts, Network FP has also roped in Independent Trainers who have experience and specialize in conducting Investor Awareness Programs in Financial Services Industry.

*\* Some of the experts may be empaneled due their prior expertise in conducting such investor awareness programs.*

## Duration & Format of each Camp

We require about 2 Hours to deliver the sessions for each Camp. Usually 2 sessions are delivered by 2 trainers in 2 hours including QnA session. Most Camps will follow the following format;

**Session 1: Financial Wellbeing - Peace & Prosperity with Money**

*By the Empaneled Personal Finance Expert*

**Session 2: Channelizing Savings into Right Investment Products**

*By Independent Trainer appointed by Network FP*

Some of the personal finance experts may customize the content and program structure based on their experience, expertise and specialization. The host organization may also request for customization based on audience needs and requirements.

## Audience Categories & Specialized Content

Apart from the common Financial Wellbeing session mentioned above, our empaneled Personal Finance Experts can deliver programs which are tailor-made to specific audience categories like;

### **LifeCycle Based**

- Financial Wellbeing for Youngsters
- Financial Wellbeing for Newly Employed
- Financial Wellbeing for Young Couples
- Financial Wellbeing for Parents
- Financial Wellbeing for Middle Aged
- Financial Wellbeing for Retired

### **Niche Based**

- Financial Wellbeing for Women
- Financial Wellbeing for Private Sector Employees
- Financial Wellbeing for Government Employees
- Financial Wellbeing for Professionals - Doctors / CAs / Lawyers etc
- Financial Wellbeing for Businessman / SME Owners
- Financial Wellbeing for Armed Forces
- Financial Wellbeing for Non Resident Indians (NRIs)
- Financial Wellbeing for Parents of Special Children

## Who is funding the campaign

Mutual Fund Companies have been mandated to spend 2 basis points of their Assets under Management by the government regulatory body - SEBI (Securities & Exchange Board of India) on Investor Awareness Programs (IAP). The campaign costs & organizing efforts are being funded by the Mutual Fund Companies from their IAP funds.

## Will you try to sell / market anything

NO. FW Month initiative is being taken by professional financial advisors & mutual fund companies with an intention to reach out to consumers, create awareness about need for financial planning and also be of service to society. Each of the expert / speaker gives a declaration in writing to adhere to ethical practices and refrain from any sales or promotional content / activities. However if participants want to avail of services from the financial advisors, they can do so by contacting them directly after the Camp.

## What is Network FP

Network FP is the organizer of this campaign. Network FP is a nationwide network and a knowledge sharing platform for financial planners & advisors in India. It helps advisors to build a client-centric, process-driven and knowledge-based financial advisory practice through its various training programs, online forums and national conferences.

## How to proceed if interested

If you are interested in hosting a Financial Wellbeing Camp in your company / club / association / institute / housing society, you will have to give us the following tentative details;

- Organization name
- Date and time preference
- Venue availability
- Audience size
- Audience category

For scheduling the Camp at your place or if you need any further information, kindly contact any one of the empaneled personal finance experts or Network FP.

A Consumer Awareness Campaign Organized by **network FP**  
Financial Planners Network of India

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