



Max Secure Financial Planners presents



Financial Wellbeing Camps are a 2-3 Hour educational & interactive programs by personal finance experts & independent trainers organized in companies, housing societies, clubs, associations & colleges to educate the participants on achieving financial wellbeing and help them get started with basics of managing their money in a better & more meaningful way.



Session 1: Financial Wellbeing: Achieving Peace & Prosperity with Money

- Making the best use of Financial Resources - Income, Expenditure, Assets, Liabilities
- Being Prepared to face any Financial Shocks - Job Loss, Accidental Disability, Medical Emergencies in family, Death in Family, Natural Disasters
- Being on track to achieve Financial Goals - Children's Education, Buying a House, Retirement and other family obligations and personal dreams
- Attaining Financial Wellbeing - achieving peace and prosperity with "31 Actions"

Session 2: Channelizing Savings into Right Investment Options

- Avoiding common mistakes of savings and investments
- Automating your savings and investments to fulfil specific goals & objectives
- Comparison of Investment Options available for Retail Investors - Risk, Return, Tax, Duration, Liquidity, Suitability etc
- Understanding and Investing through Mutual Funds

Financial Wellbeing Camps is a joint investor education initiative by Personal Finance Professionals, Financial Services Industry & Network FP (Financial Planners Network of India).

www.financial-wellbeing.com

Peace & Prosperity with Money