

## List of Workshops

### **Money – A Paradigm Shift**

Most of us spend working hours worrying about our finances which eventually leads to higher health problems and lower productivity to your employer. This financial education workshop supported by practical tips and guides aims to impart learnings on money management. The tools used in the workshop helps participants to bring learnings into practice. The workshop can be structured for a financial literacy programme by the corporates for their employees. We also conduct this workshop in smaller groups so that the maximum participants can have interaction with the experts.

### **Money Management For Gen Y**

You start managing your money as you move in your professional career. If you lack awareness you will commit mistakes. The misuse of credit cards and lifestyle credits happens more at a younger age. If learnings on money matters can be inculcated as early as a student or on your first job you will be more efficient in managing your own earnings. This workshop aims to achieve this objective. Awareness about credit cards, good and bad loans, student debt, savings and spending and many other such aspects get covered here. Through this workshop colleges can run financial education programme for their students or corporates can inculcate the learning among young earners so that their productivity does not fall due to mismanagement of their own finances.

## **Workshops for Special Needs Children Families**

Special children families have to plan for two generations- child and themselves. This increases the concern for them which can be addressed by increasing self-awareness. What are these concerns, how to plan at various life stages of child, why identifying child requirement is important, role of a Will & a Trust and what planner can do are some of the areas which we cover through our workshops customized for special needs children families. Since we conduct these workshops in smaller groups families can come together and avail the benefit. Apart from these NGOs and other organizations working with such families can assist them in their financial matters by organizing these financial education workshops through us.

Below are two levels of workshops we will conduct –

- ✚ Financial Planning For Special Needs Children Families
- ✚ How To Plan for Two Generations?

## **Wills and Estate Planning Workshop**

The Wills & Estates Planning Workshop aware you on essentials that should be considered while planning for distribution of assets after you. How to write an effective will and where formation of trust is important are few aspects covered in this workshop. We have customized workshops for different segments wherein businessman/professionals planning for succession and special children families can avail the benefits.