

Singapore (Head Office):

One Fullerton, 1 Fullerton Road, Level 2, Singapore 049213

Tel: 65143217/20 Fax: 62415955 Email: accounts@trustedu.com Website: www.trustedu.com

Branches:**Philippines:** Unit 3-B Nicolas Bldg., Quirino Avenue, 8000 Davao City**Lao:** Unit 21, Sisungvone Village, Saysettha Dist, Vientiane**Vietnam:** 21st Floor Capital Tower, 109 Tran Hung Dao St. Hoan Kiem Dist. Hanoi Vietnam**Cambodia:** #54, Street 63 Daun Penh, Phnom Penh, Cambodia

This course helps you, in several ways, to understand what professional help you will need and what financial instruments to use. It offers an up- to-date view of tax planning and systematic investing combined with sound approaches to college funding, insurance, and overall investment planning. From the introduction, to the three financial statements, to the practical case studies at the end, this course will provide you with the tools you need to think through and act on your financial future.

The objectives of this course are:

1. To add to your knowledge and understanding of money management in order to invest your funds more effectively
2. To help clarify long term goals and prepare for a secure retirement.

WHO SHOULD ATTEND: This workshop is essential for all Team Leaders, Supervisors, Executives, and all other responsible staff

DURATION: 2 days (can be customized to 1 or 3 days)

SUPPLIED MATERIALS: Participant Reference Guide, Practical Exercises, and Personality Profile Assessment Guide

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PERSONAL FINANCIAL FITNESS

Contents

Part 1: Financial Planning: An Overview

- ❑ What Is Financial Planning?
- ❑ The Financial Planning Process

Part 2: Examine And Diagnose: Determining Your Financial Condition

- ❑ Examine Your Financial Situation
- ❑ Think And Grow Rich
- ❑ Three Important Financial Statements
- ❑ The Role Of Insurance In Financial Planning

Part 3: An Rx For Investment And Tax Planning

- ❑ Making Your Money Work For You
- ❑ Seven Factors Influencing Your Investment Decisions
- ❑ Qualified Retirement Plans

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Part 4: Planning For The Future

- ❑ College Funding
- ❑ Systematic Investing
- ❑ Retirement Planning
- ❑ Estate Investing

Part 5: Practical Case Studies

- ❑ Maximizing Investment Returns
- ❑ Helping The Single Parent Thrive
- ❑ Adding Glitter To The Golden Years
- ❑ Providing For The Future

Part 6: Monitor The Results

- ❑ The Financial Fitness Exam

Part 7: Glossary & Resources

Part 8: How To Choose A Financial Planner

