

GPW

Great Place to Work

Initiative for Corporates

Wellness Through
Financial Planning

————— with —————

THE VOLATILITY GAME

REBALANCE STRATEGY

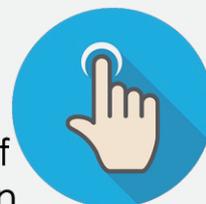


Concern

It is observed that Financial Stress is the biggest challenge among the employees today, on account of rising lifestyle inflation, improper planning and lack of product knowledge. And on account of above, employees are burdened with loan, be it in the form of credit card, housing or children education etc.

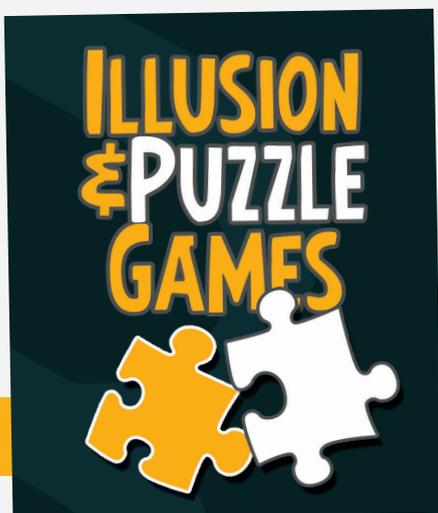
Call to Action

In order to cater to the need we have taken an initiative of **"Wellness Through Financial Planning"** with our Gamification tool called **"The Volatility Game"**. It is observed that people understand concepts in Gamified way better than theory and thus with puzzle, board and software based games it would be learn with fun.



Objective

When financial well being is complied the stress level rarely emerges among employees and in turn it enhances the productivity of the employees and organisation.



Content of the program:

“Wellness through Financial Planning”-

This program on Personal Finance Awareness is a 2 hour workshop. It will be conducted in a Game format “The Volatility Game” which has been awarded as MOST INNOVATIVE GAME on PERSONAL FINANCE -by ECONOMIC TIMES & WEALTH FORUM in 2018 . The session will ensure engagement, participation and involvement of each and every participants during the program. This will be followed by one on one coaching with each employee which will ensure a preparation of Financial Plan for various goals such as Child Education, Marriage, Travel, Retirement etc.

Details:

- 1) Understanding Money, Investment, Cash Flow with respect to wealth Creation.
- 2) Understanding Financial Terms and Ratios with practical use in Investing.
- 3) Understand Volatility and understanding the art of Re Balancing.
- 4) Inspiration - Motivation to create wealth with educational videos, Group activity, and role plays etc.
- 5) Financial Planning and Tax Planning for Individuals
- 6) One on one coaching to create financial plan and understanding the investment options

Ideal group size for conducting each session is between 30 to 90 people.



An initiative by



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Become a Tribe Member:

Participants may opt to become member of Money Magnets Tribe. Through this program the employees of an organisation will get practical exposure to invest and identify funds and stocks for long term wealth creation for self and their family. Moreover, they can attend conference with Industry expert at a minimal cost or nil cost.



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