Managing Your Personal Finance

Workshops

The purpose of the workshop is to define and describe personal financial planning process in the context of the assets, liabilities and cash flow statements.

The workshop will be divided into two parts. The first part will be a lecture and presentation on financial planning process reflecting current/ given market environment indicators/conditions.
The aim of the second part is to invite and involve participants into practical session devoted to financial plan concept and investment strategy based on a case study.

1. We will talk about money: assets, liabilities, income, expenses and savings.
2. We will build a financial SWOT analysis.
3. We will talk about people/customers life cycle, investment time horizon, risks and asset classes allocation.
4. We will build a hierarchy of goals and financial needs.
5. We will build an exemplary financial plan. Together.

Please book 180 minutes of your time.

The workshop is dedicated to a group no bigger than 20 people. Recommended 16 if we decide or it is possible to split people into 4 teams.