



My Financial Advisor

Wealth Management-Risk Management, Insurance Planning, Investment Planning, Tax Planning, Estate Planning (Wills, Trusts and Legal services) and Business Planning

Financial Wellness Program For Corporates



INTRODUCTION

World-class companies help to increase productivity and performance of their people. They also help them develop skills and expertise to improve their lives. You may have creative people and marketing wizards working for you. You pay them well and look after them in many ways. But are you helping them to save judiciously? Do you care how good they are in managing their personal finance on their own? Do they know the basics of investing judiciously? When brokers, insurance agents and advisors come calling, are your employees prepared to get the best? Research found employees spend 8 hours out of each 40 hour week thinking about their personal finances.

According to Cambridge Human Resource Group : "32% of Human Resource Executives believe decreased productivity caused by personal finance problems was often an overlooked workplace issue with dire consequences."

We work on the steps to eliminate financial stress, establish meaningful goals and enrich your employee's

life. Employee training program will help your employees make smart daily financial decisions throughout their work lives and avoid costly mistakes in the future. Employee training program is increasingly becoming a significant tool in improving your workforce, enhancing work-life balance, and reducing financial stress.

RISING COSTS

Today, due to rising inflation, living expenses, real estate bubble, rising fuel prices and slumping stock prices, the issue of financial wellness is top-of-mind among employees.

FINANCIAL STRESS

According to a recent study, nearly one third of employees say financial problems are affecting their job performance. These employees, according to research conducted at Virginia Tech, are more stressed, less productive and absent more often than others. Implementing a financial education program at your company will give your employees the tools they need to better understand and apply all aspects of personal finance. Personal finance Knowledge can reduce stress and bring peace of mind.

EASY TO UNDERSTAND

That's why we at My Financial Advisor have created a Financial Literacy program that will help your employees make smart and informed choices about money while avoiding costly mistakes.

We have also created a CD which is a compilation of our Founder Mr. Amar Pandit's insightful columns from various publications right from

Economic Times, Business Standard, Times of India, DNA, Indian Express and Hindustan Times that will help inform and educate your employees on all aspects of personal finance.

The program consists of straight-forward, unbiased advice in non-intimidating language. **Financial Literacy** will give your employees a solid understanding of personal finance.

FINANCIAL LITERACY

4 or 8 hour Program covering all topics mentioned aside

- ✓ Participants will be given handouts and exercises.

FREE GIFT

A CD comprising of 95 columns and case studies to read at leisure.

The topics covered are:

- ✓ Introduction to financial planning.
- ✓ Cash flow/ Debt management.
- ✓ Risk management and Insurance planning
- ✓ Investment and Tax planning.
- ✓ Retirement planning and Estate planning.



- Murli Iyer - 9821529952, murli.iyer@myfinad.com
- Tejal Damania - 9819257504, tejal.damania@myfinad.com

3-40, Dheeraj Heritage, S.V Road, Milan Subway Junction, Santacruz (W), Mumbai- 400054. Tel: 022-26605075 / 022-26601302; Email: info@myfinad.com; Website: www.myfinad.com