



# 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 Individuals



### INTRODUCTION

Every individual would want to give the best to his / her family. With globalization setting in, new malls opening every day, families are exposed to many more international products / domestic brands. Individuals have to meet the old age medical requirements of their parents or get children educated in the best possible universities. Apart from the above getting children or siblings married is a huge expenditure that one has to incur. Everyone would aspire to move into a bigger house or own a bigger car. To achieve these goals , an individual has to plan his/her finances prudently apart from setting aside some amount for emergencies or exigencies.

Our Financial Wellness Program for individuals will help achieve all your Financial Goals without losing your health or peace of mind.



### RISING COSTS

Today, we live in an era where phrases such as pink slips, budget cuts, economic slowdown are common. At the same time, individuals are concerned about the rising cost of lifestyle expenses, healthcare, childrens needs, real estate and so on.

### FINANCIAL STRESS

The above factors have caused some financial stress to most people and even the ultra rich requiring them to scale down their vacation and in some cases even cancel their exotic vacation. In such a scenario the psychiatrists are doing roaring business trying to curtail the suicides in this country due to financial reasons and comforting those suffering from depression.

According to a recent study, nearly a third of individuals say financial problems are affecting their job performance. Individuals, according to research conducted by Tom Garman at Virginia Tech, are more stressed, less productive and absent more often than others. Participating in a financial wellness program will give you the tools you need to better understand all aspects of personal finance. Knowledge and utilizing this knowledge to take prudent decisions can reduce stress and bring peace of mind.

### FINALLY A FINANCE PROGRAM WHICH IS EASY TO UNDERSTAND

The question on most peoples mind is what do you do today? So what is

the solution to address this stress? That's why we at My Financial Advisor have created Financial Wellness, a hands on program that will help you make smart and informed choices about money while avoiding costly mistakes.

Comprised of straight-forward, unbiased, advice-filled and non-intimidating language , **Financial Wellness** will give you a solid understanding of all personal finance issues including the topics mentioned aside.

### FINANCIAL LITERACY

4 or 8 hour Program covering all topics mentioned aside

### FREE GIFT

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

The topics covered are :

- ✓ Introduction To Financial Planning
- ✓ Cashflow/Debt management
- ✓ Risk Management and Insurance Planning
- ✓ Investment Planning, Asset Allocation and Tax Planning
- ✓ Retirement & Estate Planning



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