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Online **PERSONAL FINANCE TRAINING**

The Training Program is aimed to equip participants with practical tools and insights to master their finances and achieve their 2025 financial goals. The course delves into essential topics such as budgeting, saving, investment strategies, debt management, retirement planning, and more.



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PERSONAL FINANCE MANAGEMENT



Join our next Impactful
Practical Training, and
transform your personal
finance management
skills

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KSH 8,000
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PAYMENT
ACCEPTABLE





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**YOUR 2025
FINANCIAL
GOALS MADE
EASIER**

**Empowering you with
practical training to
achieve your 2025
financial goals and
aspirations**



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Ksh 2025
for the first 25

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TRAINING TOPICS

SAVINGS

INVESTMENT

BUDGETING

RETIREMENT
PLANNING

TAX SAVINGS

ESTATE PLANNING

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Our process.

How do we do it?

- **REGISTER ONLINE**

Register on our online training portal to create an account. You can register by scanning the QR code below or contact our team for support.

- **ACCESS THE TRAINING**

Enroll for the Program. It is a 11 Week training that will be conducted via Zoom, 2 hours session twice a week.

Training Materials can still be accessed on the Portal

- **ACCOMPLISH THE TRAINING**

By the end of the Cohort Training , participants will get a Certificate. The participants will still have access to the portal on finishing the training.

**TRAINING FEE
CAN BE PAID IN
3
INSTALMENTS**

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PERSONAL FINANCE MANAGEMENT TRAINING

S N A P S H O T S Y N O P S I S

1

Introduction to PFM

- Introduction to the Topic
- PFM Concepts

2

Sources of Personal Finance

- Consolidating Income Cashflows

3

Budgeting

- 50,30,20 Budgeting concept
- Budgeting Tools

4

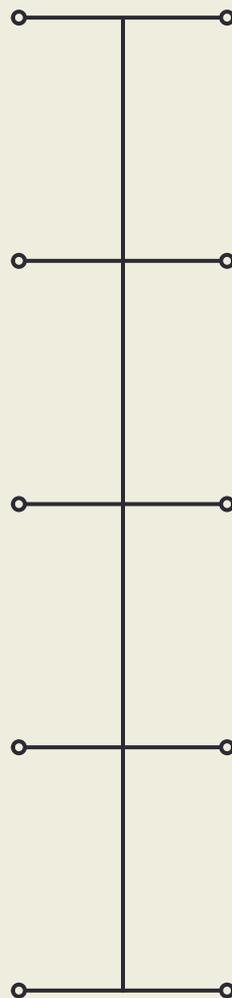
Savings

- Savings Tools: SACCO's , MMF's
- Emergency Funds

5

Investment

- Traditional Investment
- Alternative Investments



Financial Risks Protection

- General Insurance
- Life Insurance

6

Tax Planing

- Legal Tax Avoidance
- Tax Compliance

7

Debt Management

- Leveraging Debt
- Managing Debt Levels

8

Retirement Planning

- Provident and Pension Plans
- Individual Pension Plans
- Retirement Medical Plans

9

Estate Planning

- Private Trusts
- Wills
- Succession Planning

10

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SAVINGS

Emergency Funds
SACCO's
Fixed Deposit Accounts

INVESTMENT

Collective Investment Funds

- Money Market Funds
- Fixed Income Funds

Government Treasury bills & Bonds

Alternative Investments

Stock market - Shares , Indices

4 PILLARS ON INDIVIDUAL FINANCIAL PLAN

FINANCIAL PROTECTION

- General Insurance
- Life Insurance
- Endowment Policies
- Education Plans

FINANCIAL PLANNING

- Consolidating income cashflow streams
- Budgeting
- Individual Retirement Plans
- Private Trusts

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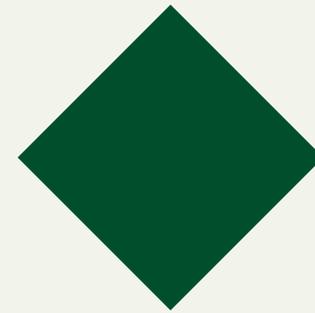
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TRAINING OUTCOME

At the end of the training programme you will be in a position to achieve the following:

- **Grow and diversify your portfolio**
- **Be a better Finance Manager**
- **Budget effectively**
- **Plan for your Retirement**
- **Manage Financial Risks**

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GET IN TOUCH WITH US

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