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Persiaran Mayang Pasir
Bayan Baru, 11950
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Course Name: Personal Finance Management

Synopsis

This session aims to provide participants with practical strategies for building financial security and achieving their long-term financial goals, by developing a foundational understanding of personal finance concepts and learning how to create and implement a personalized financial plan.

What You Will Learn

By the end of this session, the learners will be able to:

- Define and explain the six principles of personal finance.
- Apply the principles of budgeting, saving, and spending to their personal financial management.
- Create a personalized budget and financial plan based on their income, expenses, and financial goals.
- Identify and evaluate different types of finance protection plans, such as insurance, emergency funds, and retirement plans.
- Select and implement appropriate protection plans based on individual financial needs and goals.

Who Should Attend

- Business Owners
- Managers
- Marketing and Sales Professionals
- Finance Professionals
- Anyone involved in pricing decisions

Prerequisite

N/A

Course Methodology

Handouts, Slides, Interactive Quiz, Group Activity, Puzzles

Course Duration

1 day - 9am - 5pm

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Course Structure

Session 1: Financial Fundamentals

This module introduces participants to the essential building blocks of personal finance. They gain an understanding of income, expenses, assets, and liabilities. Through interactive discussions and activities, attendees connect these concepts to their own financial situations, setting the stage for informed decision-making

Session 2: *Financial Planning and Goal Setting*

Module 2 guides participants in setting financial goals, prioritizing them, and crafting a personalized financial plan. Through hands-on activities and peer feedback, attendees develop a roadmap for achieving their financial aspirations.

Session 3: Financial Communication

Emphasizes clear communication of financial information, tailoring data presentation for non-finance stakeholders, and building financial literacy within teams. Essential skills for effective financial communication and team collaboration.

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Session 4: Financial Statements

Focuses on financial statements, covering the income statement, balance sheet, and cash flow statement. Participants will learn to interpret these statements and understand common financial metrics and ratios for informed decision-making.

Session 5: Protecting Your Financial Future

The final module highlights the importance of insurance and risk management in personal finance. Participants engage in discussions and role-play scenarios to understand insurance types, evaluate their needs, and enhance their financial security.