

FinSmart

Smart Steps to Financial Freedom

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FinSmart Seminars support companies:

Typically, companies provide assistance to their staff when things go wrong in many areas of their lives. For example, counselling in cases of personal challenges, loans for financial loss, stress management Seminars, and time management Seminars etc. FinSmart Seminars is designed to form part of the support that companies offer their employees. If employees are constantly worried about their financial situation, they are distracted at work and highly stressed. Giving them the opportunity to learn these important financial skills will create a happier, more fulfilled staff body that would require less financial assistance when they come into hard times.

Overview

The FinSmart Seminar is designed to help people manage their personal finances effectively so that they can put themselves on the path to financial freedom. Many people who are highly educated and highly proficient in many areas of their lives seem to battle with managing their money and often land up with huge amount of debt and very little (if any) savings and investments.

Objective	Outcomes
<p>This Seminar offers to empower people, to:</p> <ul style="list-style-type: none">• manage their money effectively• understand important financial principles• develop a realistic personal budget• begin the process of creating personal wealth• examine their limiting beliefs and create empowering ones instead• put themselves on a track to financial freedom	<p>Delegates attending these Seminars will walk out with:</p> <ul style="list-style-type: none">• knowledge, skills and tools for immediate implementation in their lives• a realistic personal budget• a clear financial plan• a clear understanding of what drives their thinking around money• a new understanding of the thinking that will move them forward• a savings and investment plan• the ability to handle their finances with ease

"We have to develop a healthy, honest relationship with our money and we have to see this relationship as a reflection of our relationship with ourselves".

Suze Orman, Women & Money

Structure



The FinSmart Seminar will involve learning new skills by using a coaching approach which means that it is highly interactive and experiential. Each delegate will apply the skills learnt to their own personal situation to gain maximum benefit from the programme. Seminars are offered to groups of between 8 and 16 and consist of 4 modules of 3 hours each, run over 4 weeks. Delegates must attend all 4 modules since each module builds on the learning from the previous module. One month later, a 5th module is available as a follow up, which serves to embed the skills learnt and to track delegates' progress and development.

<p>Module 1:</p> <p>Introduction</p> <p>Financial Goal Setting</p> <p>Basic Skills and Terminology</p>	<p>Module 2:</p> <p>Personal Money Profile</p> <p>Budgeting & Debt</p>
<p>Module 3:</p> <p>Empowering Thinking</p> <p>Closer look at Spending</p>	<p>Module 4:</p> <p>Creating Personal Wealth</p> <p>Savings & Investments</p>

Cost: R3 500 per delegate for the FinSmart Seminar, which includes all materials, workbooks, DVDs and coaching contact between sessions.

FinSmart Seminars are run by highly skilled and experienced coaches who have specialised knowledge in the area of Finance. They have also shown that they have reached a level of financial freedom in their own lives.

Facilitators:

<p>Daphna Horowitz</p> 	<p>Gerda Venter</p> 
<p>Daphna qualified as an Actuary after completing a BSc (Hons) in Actuarial Science (Wits University) and an FIA via the Institute of Actuaries in London. She then obtained her certification as a Life coach and an Executive coach through Results Coaching Systems (Australia). She is certified as an Associate Certified Coach (ACC) by the International Coach Federation (ICF). In addition, she is an accredited facilitator in the 9 conversations in Leadership programme and serves as Treasurer for the ICF Gauteng Chapter.</p> <p>Daphna is passionate about working with people to create their unique, personal success story. Having experienced a major career change herself, from Actuary to Executive Coach, Daphna is committed to coaching people to make meaningful changes in their lives towards living a life of purpose. Her specialty is in working with clients to create a life of balance and fulfilment, taking a holistic approach, while unleashing their full potential with a particular focus on leadership development and empowering people to financial freedom.</p> <p>Visit her website for more:</p> <p>http://www.peacsolutions.co.za</p>	<p>Gerda Venter is a Business and Executive coach, and founder of Sakura Coaching™, based in Johannesburg South Africa. Gerda qualified as an Engineer and Strategic Business leader after completing the B.Eng(Electronics) (UP) and MBL (Masters degree in Business Leadership) (UNISA) degrees. Her coaching training includes CEP Coaching certification (CoachU Inc.), Adfen accreditation for Enneagram assessments and WABC (World Wide Association of Business Coaches) accreditation for business coaching. She draws from a broad base of business and industry experience with proven expertise in business and strategy planning and execution; strategic marketing, business start-ups; IT outsource contract management; team building</p> <p>Visit her website for more information:</p> <p>http://www.sakuracoaching.com</p>

