

INTRODUCTION TO FINANCIAL WELLNESS

Perth (Metro)

Session:

1 Hour presentation (45 min, 15 mins Q&A)

Topics:

Overview of Superannuation, Debt, Saving, Home Ownership, Investment, Retirement

Reach:

Ideally 20 - 30 attendees per session

Less than 30 is preferred for maximum interaction and questioning

Requirements:

Venue offering seating for up to 30 attendees, with access to a projector screen

Cost:

\$1,500 plus GST

Following the Introduction presentation, the following sessions are available for further and more detailed education:

Superannuation - Why you need it, and how to make the most of it

The Basics - Debt and Saving

Investing - How Bonds, Shares, and Property work as investments

Retirement - 50+ Transition to Retirement: Steps for the next decade

All sessions are presented by Lacey Filipich, Founder of Money School.

Session Times, Topics, and Delivery can be customised to suit your team.

* Private 1:1 sessions are provided to offer a private and confidential opportunity to ask questions and be directed to specific resources. No personal financial advice is provided and attendees will be asked to acknowledge their understanding by signing waiver.

