

# FINANCIAL WELLNESS PROGRAM

## Perth (Metro)

### Sessions:

2 x 1 Hour presentations (45 min, 15 mins Q&A)

Usually held in the morning and afternoon providing the best opportunity for all team members to attend

### Topic:

Superannuation - How it works and why you need it

### Reach:

Ideally 20 - 30 attendees per session

Less than 30 is preferred for interaction and questioning

### Coaching:

8 x 1:1 sessions with Lacey Filipich (25 mins each)

These are available to attendees following the presentations, providing an opportunity for private and confidential questioning and access to specific resources.

(eg. 10.30am - 12.30pm and 14.30pm - 16.30pm)

### Requirements:

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

Private Meeting room for 1:1 sessions

### Cost:

\$5,000 plus GST

\* Discount Offer \* \$3,500 plus GST for bookings made by 1st July 2019

### Further sessions to consider:

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.

