



Certification workshop on **BRIDGING THE 'PERSONAL FINANCE' GAP**

One day
Workshop

on 10th Oct 2014

at Hyatt Regency, Sahar Airport Road, Andheri East, Mumbai - 400099

..by Ms Tejal Gandhi

PROGRAM OBJECTIVES

1. To have an overall understanding of the various Investment options vis a vis current economic scenario which is so dynamic and ever-changing.
2. To demystify the jargons used by various Wealth Managers, Private Bankers.
3. To reconstruct/ review your own portfolio in tune with the current investments being offered in the marketplace.

WHO CAN ATTEND

Executives / Managers from all disciplines, Professionals from Public / Private Sectors, Associates from NPOs / NGOs, Academicians, Consultants, Practitioners.

In short, all those who want to secure a comfortable Future Financial Position

OUTLINE OF THE WORKSHOP

1. Economics and Linkage to Personal Finance
2. Investments Essentials – Food for Thought
3. Asset Allocation: Which egg is in which basket?
4. Achieving Life Goals through Planning
5. Do you have a balanced portfolio? Towards debt or towards equity.
6. Frauds in the Marketplace: A watchout



Founder & CEO: Money Matters
DSM, CFP^{CM} (Certified Financial Planner)

"Greed is not a Financial Issue, it is a heart issue"

... Andy Stanley

"A good financial plan is a road map that shows us exactly how the choices we make today will affect our future"

... Alexa Van Tobel

ABOUT THE SPEAKER

Ms Tejal Gandhi is a Certified Financial Planner (CFP). The CFP Program is affiliated to the Financial Planning Standards Board, India, which is the affiliate of FPSB, USA. She has over 24 years of experience in Banking and Financial Services industry.

She has worked with Standard Chartered Bank over 13 years and has extensive experience in Retail Banking and Communications all over India and overseas. She was part of the 6 member team representing India which was sent to Hongkong for the Y2K project.

In 2002, she founded her own firm called 'Money Matters' which focuses on Wealth Management and Consulting. She works with various focused groups and manages portfolios and does Financial Planning for HNIs and is a Certified Financial Planner.

She is also invited by various Chambers of Commerce, Rotary Clubs, Associations and Colleges to deliver talks / lectures on Personal Finance in today's times. She is a mentor and guide to various youth entrepreneurship programs and helps guide and advise them on the procedure and path they should take.

Timings: 9.30am - 5.00pm

Registration begins at 9.00am

REGISTRATION	Email: admin@ifeil.org • feilnpo2014@gmail.com +912266718382, +918879937775, +919920336086, +919821152591 Mention the name of participant, company, contact details. Fees includes lunch, tea, course material, etc.
DELEGATE FEE	1 Delegate: INR 10,000/- plus Service Tax @ 12.36% Cheque/DD drawn in favour of "Forum for Emotional Intelligence Learning" should be sent to: FEIL, 204-B, Sumit Samarth Arcade, Arey Road, Goregaon (West), Mumbai - 400062.

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