



## Financial wellness program for managers



*The first ever programme exclusively designed for executives to provide them with real insight in all they should know about Finance & Investment giving them a life-time experience in understanding and managing MONEY.*

*The objective of the program is to educate the employees and allow them to understand how each financial decision affects other areas of their lives. The program will help your employees to make smart and informed choices about money while avoiding costly mistakes.*

### **Benefits of this program**

- *Planning for financial goal.*
- *Work life balance.*
- *Peace of mind.*
- *Increase employee engagement.*

### **What affects your employees also affects your business.**

More people are stressed out about their personal finances than ever before. That makes it difficult for many employees to concentrate on work. Studies show that 30% of employees handle personal financial matters on work time, while 22% spend much of their time at the office worrying about their finances. Other reports have found that financial stress causes staff members to be less productive, less engaged and less healthy.

Offering comprehensive financial wellness program at work will go a long way to reducing that personal financial stress. But why should you worry about an employee's financial wellbeing? The answer is simple: what affects your staff also affects your business.





## **About Us**



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Mr. Jomon Joseph, M.Com, MBA,CPFA, is an Investment Strategist providing Investment Research and Financial Planning Services to individuals and corporate, specializing in the areas of Investment Research, Investment Strategies, Advanced Excel Modeling, Business Analysis and Financial Planning. He has extensive experience in the financial service sector and was associated with Sykes & Ray Equities (I) Ltd., Mumbai, served as the Head of Fundamental Research. He has conducted several training programs for Investors, Management Institutes and Corporates across India. He is the visiting faculty for various management institutes in India and the First SEBI Registered Investment Advisor from Kerala. ♣ At present he is the promoter of The Strategist Cochin, ♣ Resident Director of CONTROL & APPLICATIONS AUTOMATION ABU DHABI., ♣ Centre Head of Financial Planning Academy Mumbai, ♣ Trainer, Ambition Training Solutions Mumbai, ♣ Microsoft Certified Excel Specialist.

## **Program Details:**

*The program can be designed based on your specific requirements. These sessions are charged on a per session basis and would be conducting the session at your premises or outside. For more information please contact Email: [info@thestrategist.co.in](mailto:info@thestrategist.co.in) / call: +91 9961813730.*

