

Personal Financial Planning using Excel

24 August 2021 02:00 PM - 24 August 2021 05:00 PM

Brief Overview:

Do you always have a feeling that whatever you earn does not seem sufficient to manage the expenses? Do you get into frequent debts and lose peace of mind? Do you think that in these uncertain times, gaining financial freedom is very important? This practical program addresses all these and helps participants to manage their personal finance excellently and also to improve productivity at work.

Session content:

- Importance of Financial Planning and Financial Freedom.
- Preparing Family Budget and Cash Flow using Excel.
- Monitoring & Controlling Assets & Expenses.
- Importance of Passive Income.
- Managing Debts and Credit Cards.
- Financial Discipline and Role of Family Members.
- Myths in Managing Finance.
- Role of Psychology in Financial Planning.
- Tools to Gain Financial Freedom.

For Whom:

- Anyone interested in achieving financial freedom by managing their personal finance; Young employees in organizations; married couples with school-going children; Final year college students and those who are about to take up jobs.

Participants must have a basic working knowledge of Excel and shall have a laptop with Excel during the program for doing activities.

Key Takeaways:

- Methods of Using Excel for Personal Financial Planning
- Gaining Passion to Achieve Financial Freedom.
- Practical Tools to build wealth.
- Leveraging individual's psychology to create wealth.

Facilitator profile:

V. Viswanathan is a Corporate Trainer, Consultant, a Visiting Faculty for B-Schools, and an author. He is a trainer accredited by Global Trainers Federation (GTF).

He is DC Psychology / Coloured Brain Certified Trainer and also a Master Behavioural Skills Trainer, certified by CAMI and Middle Earth HR. He is a certified PMP and CII-SCMPro and has completed a Master Diploma in Training from IATD. He is a certified NLP Practitioner and has conducted many training programs.

Fee Details:

- **Fee Details**
- Member amount : Rs 767.00- (Including 18%GST)
- Non Member amount : Rs 767.00- (Including 18%GST)
- Total Member count : 100