



Program in Financial Wellness ELEVATE

Length: 1 month











Start your Financial wellness journey TODAY FOR A BETTER TOMORROW!







Program Overview -

HOW TO PLAN YOUR FINANCIAL WELLNESS

The program is a practical application of the basic mantras of savings, nivesh and asset classes. The program will guide you into the world of money and markets by introducing you to wide-ranging investment principles through relatable case studies.







WHO IS THIS PROGRAM FOR?

This Program is suitable for all karmic yogis who are looking to start their financial wellness journey, take control of their savings and investment and learn to take better investment decisions for their families.









Program Outcome -

ARTHIC SAMRIDHI

The financial wellness program simplifies finance and empowers the participants to use their understanding for their personal and professional practice.





MODULES

INTRODUCTION TO SAVINGS AND INVESTMENT

- * Difference between Savings, Investment and Speculation
- * How to convert savings into investments for long-term wealth creation

THE EIGHTH WONDER: THE POWER OF COMPOUNDING

* Its impact on our investments and wealth creation

WHAT ARE MACROS, AND HOW IT IMPACTS OUR SAVINGS AND INVESTMENTS

Economic growth I Inflation I Policy actions

Continued Below 1







LETS DISCUSS ASSET CLASSES

- * Equity as an asset class
 - * Debt as an asset class

HOW TO ALLOCATE ASSETS

- * Identify low-risk assets
- * Improve the outcome with diversification

INVESTING WITH MUTUAL FUNDS

- * Types and their identification
- * How to select
- * Use MF as an investment tool

CREATING YOUR INVESTMENT PORTFOLIO

- * Selection and investment of debt and equity schemes
- * Monitoring the investments
- * Calculate investment returns
- * Ways to evaluate the performance





A WA Wealth Uncomplicated

SHIKSHA GURUS



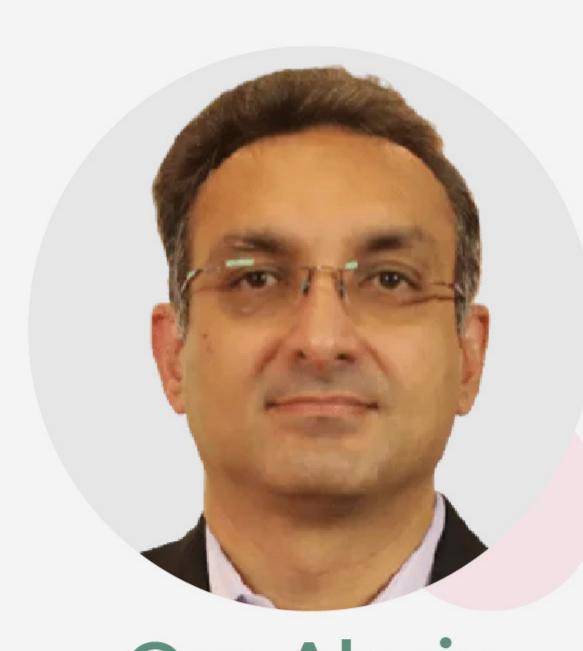
Jitender Kumar ICAI, IFIM, NMIMS



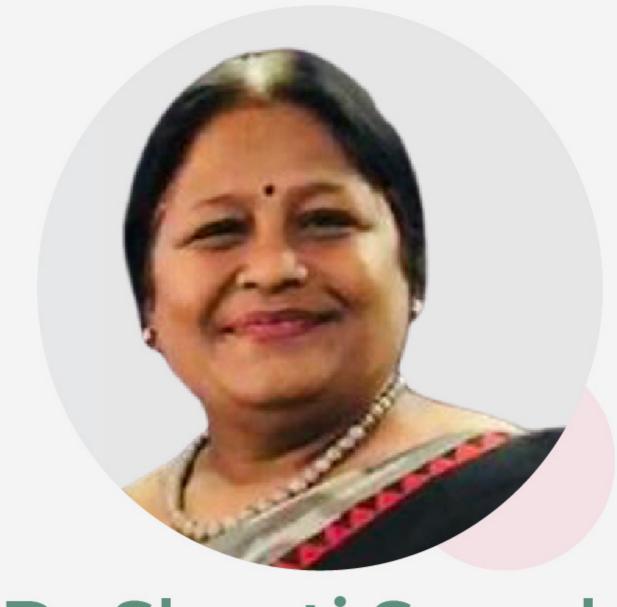
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V Sengupta
IIM Calcutta, Lehman
Brothers, Stratmore wealth







WELLNESS CERTIFICATE

| Cawa |
|---|
| WELNESS CERTIFICATE |
| —— This certificate is awarded to —— |
| |
| For successfully completing the |
| Program in Financial Wellness |
| ELEVATE |
| December 2022 |
| |
| Authorized Signatory CERTIFICATE OF COMPLETION & |
| |





ABOUT US

OAWA is managed and advised by professionals from MF and the wealth management industry and academicians and alumni from IIM Calcutta and Bangalore. We deliver curated financial wellness programs for corporate clientele.

OUR TEAM



Bekxy



Sreeja



Vikram



Sujoy



Sonali



Meenakshi



Hardi



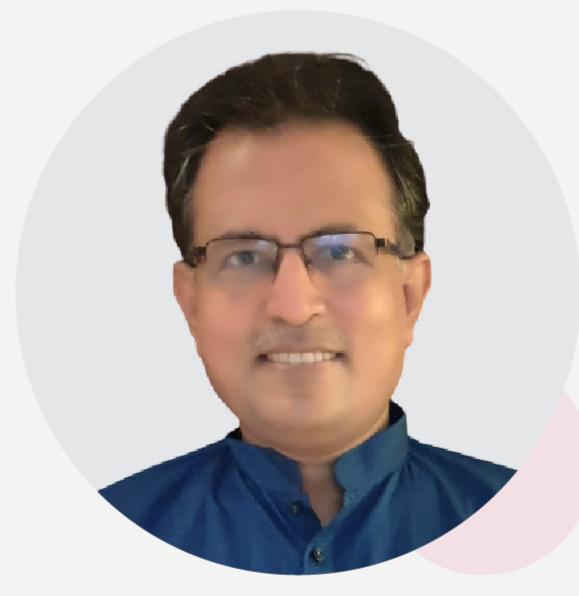
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CAMA Wealth Uncomplicated

ADVISORY BOARD



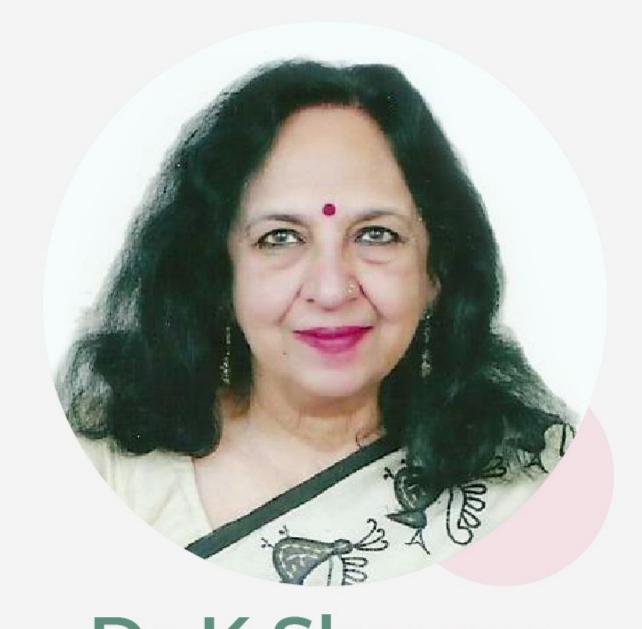
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SP Jain



Dr K Sharma
President South Asian
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Navneet Munot MD & CEO HDFC MF







WELLNESS PROGRAM DETAILS

Length: 1 month

Commencement: Monthly

New Batch commences every 3rd Tuesday of the Month

Sessions: Tuesdays and Thursdays
Timings: 7-8 pm

Fees: Rs 9,700/-(inclusive of GST)

Apply Now









Get Financially Fit Today! CONTACT US NOW

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Apply Now