



# Employee Seminars

Our 'Getting Financially Fit' seminars are just a great way for us to be able to help as many people as possible.

We understand that today, paying your employees a fair wage is often not enough. They are looking for a sense of purpose, and looking for meaning in the work they do. In addition to this, we believe that by providing further support services to staff the value assigned to these is often higher than the actual cost to the business.

Something we are passionate about is helping Kiwi's look after their financial wellbeing.

Our 'Getting Financially Fit' seminars are just a great way for us to be able to help as many people as possible, and we also offer an ongoing drop-in clinic relationship which we believe provides your team with opportunities to discuss things that are important to them.

So, what do we actually cover as part of our presentations?

1

## Being financially free – the dangers of comparison

We talk about what financial wellbeing actually is, and how being financially free can mean a number of different things to different people – for some this is being able to pay off their home, for others it might be having the freedom to travel every year. There are no right or wrong answers but it's getting your team to think about where they're actually heading.

2

## Reframing budgeting – it's importance and how to simplify it

We all know that most people don't enjoy budgeting, so instead we reframe this as simply a plan, with some little goals along the way to get us where we want to be.



## A simple way to manage money

We show your team how we actually manage money ourselves, discuss how to make it work for them, any challenges and pitfalls and how to get ahead.

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## Our three-step process

We strongly believe in our process of PROTECT – GROW – INVEST, so we talk in brief about what each of these three phases are, and how they cross-over. We then dive into more detail of each of these areas and what are the practical steps they can take to make sure these are included in the plan. This includes insurance tips and tricks, estate/succession planning, knocking out debt, buying a home using kiwisaver, repaying your mortgage, and how to use KiwiSaver efficiently.

Again, we show ways that we have used ourselves to get our plans sorted.

